NEOGOV

	NEW STREAMLINED OHC – TRAINING GUIDE
Objective:	This Training Guide focuses on the creation of an approval workflow, requisitions, SME review, setting up templates and sending notices, scheduling interviews, roles crosswalk and menu changes.

Prerequisite Requirements:

- These documents should be received with the request to fill:
  - ✓ New or updated Position Description
  - ✓ Approved screening criteria or other documentation, as required
  - ✓ Appropriate request to fill approvals
- The hiring manager (and other appropriate staff, if necessary) has been assigned the NEOGOV Hiring Manager role.

Actions to be Taken:

- Review and attach recall, departmental transfer, and interdepartmental transfer lists.

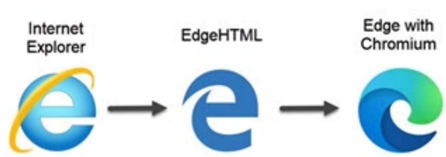
INDEX: Select a hyperlink below to navigate to that section.

BROWSER COMPATABILITY

The browsers that work best with NEOGOV are Chrome and Edge with Chromium.

chrome

The following graphic shows the evolution of the Microsoft Internet Explorer and Edge browsers over the past few years:



LOG IN INSTRUCTIONS

1. Account Activation

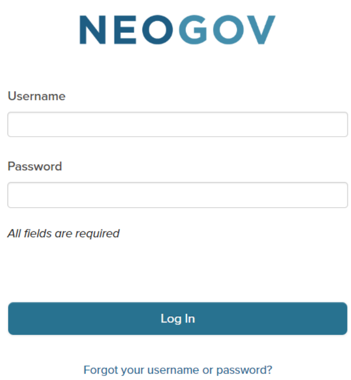
A. You should have received an **Activate Your NEOGOV User Account** email with a link to create your account **Password** using your email address as your **Username**. This activation will expire after 24 hours. If you require a new activation, please contact your HR Office or the NEOGOV mailbox at MCSC-NEOGOV@michigan.gov.

NOTE: Current NEOGOV users will use their existing username and password.

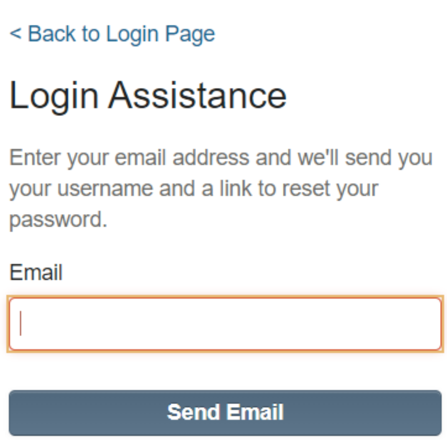
B. Click on the **Log In** >> button.

2. Forgot Password

A. To reset your password, click the **Forgot your username or password** link below the login button.



B. Enter your **email address** and click on **Send Email**. A message will be sent containing your username and a link to reset your password.

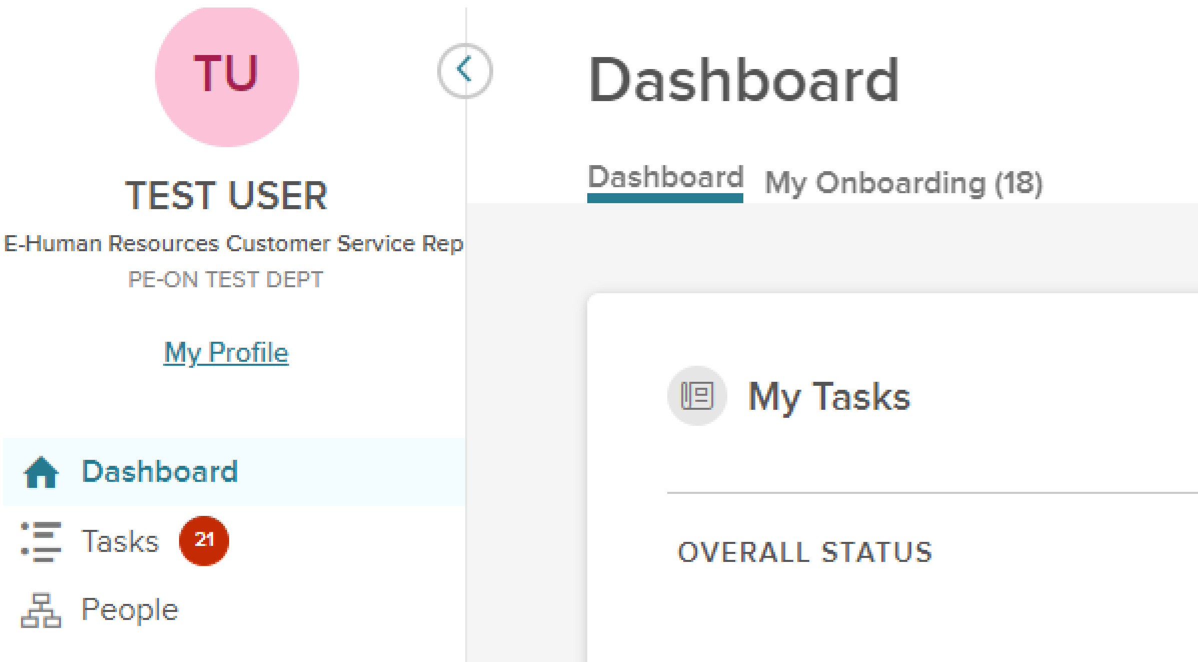


NEOGOV

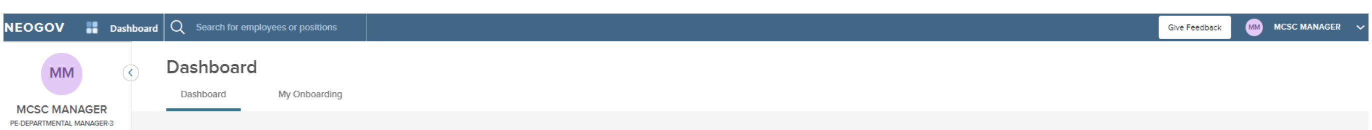
Overview of the NEOGOV Unified Dashboard

The **Unified Dashboard** serves as your personal homepage in NEOGOV. It contains the below sections specific to Recruiting:

1. **A left navigation section**
2. **My Tasks**-May display up to 5 tasks spanning all NEOGOV products based on due date, with the earliest displaying first.



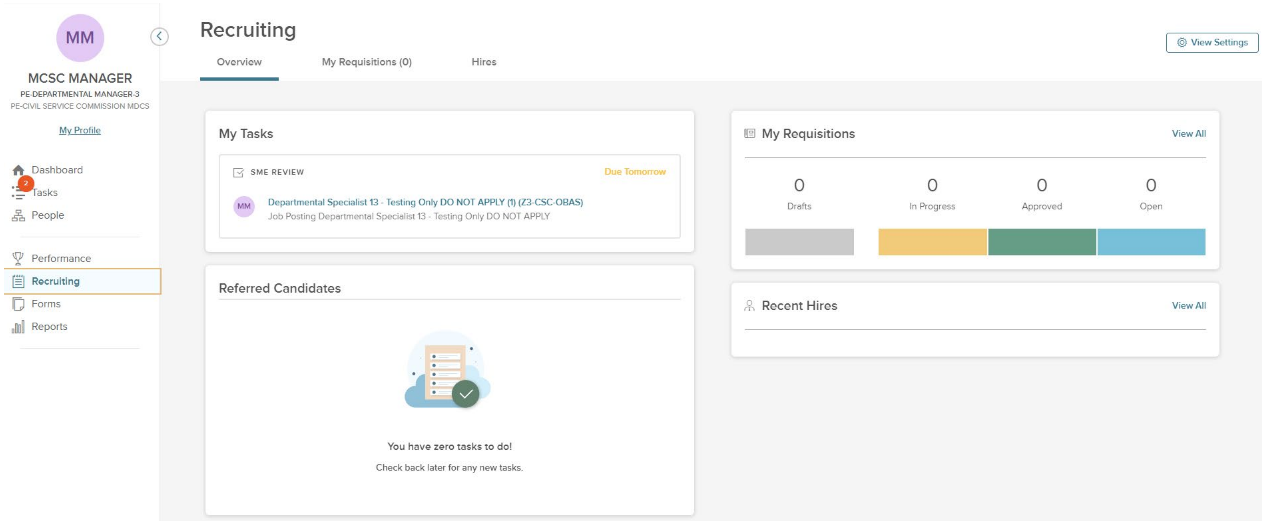
Regardless of where you are in NEOGOV, you can always return to your Unified Dashboard by clicking on **Dashboard** in the upper left corner of your screen.



1. **Tasks**
   a. May display up to 5 tasks spanning NEOGOV products based on due date, with the earliest displaying first. Filter options include **Due Date, Product, Task Type,** and **For Whom**.

2. **Recruiting**-This tab displays for employees who have **Hiring Manager, Liaison, Originator, or Approver** security roles in OHC.
   a. **Overview**-Provides you with information on **My Tasks, Referred Candidates, My Requisitions,** and **Recent Hires.**

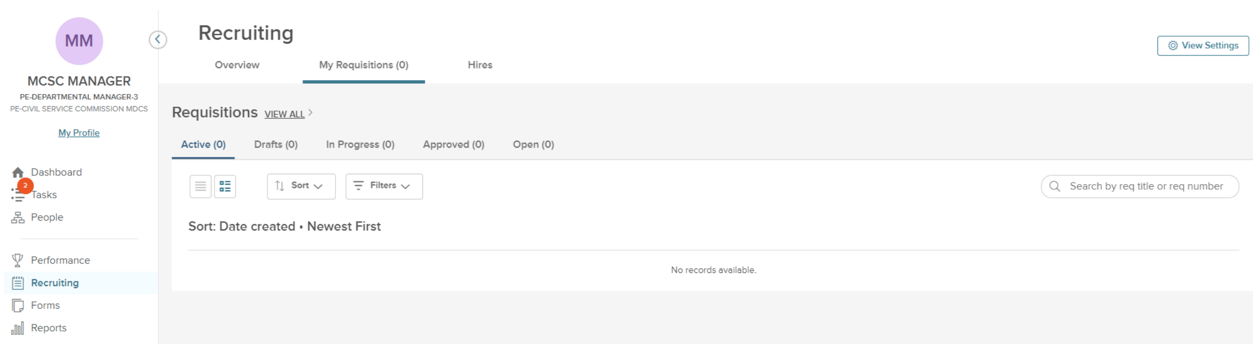
   NOTE: Only OHC tasks appear in Recruiting since this initial launch of the Unified Dashboard targets managers and employees.



b. **My Requisitions**-Displays your **Active, Draft, In-Progress, Approved,** and **Open** requisitions. These can be sorted by:

- **Date Created-Newest First** or **Date Created-Oldest First**
- **Department A-Z** or **Department Z-A**
- **Division A-Z** or **Divison Z-A**
- **Req Number Highest** or **Lowest**
- **Req Title A-Z** or **Req Title Z-A**
- **Position Code Lowest** or **Highest**.

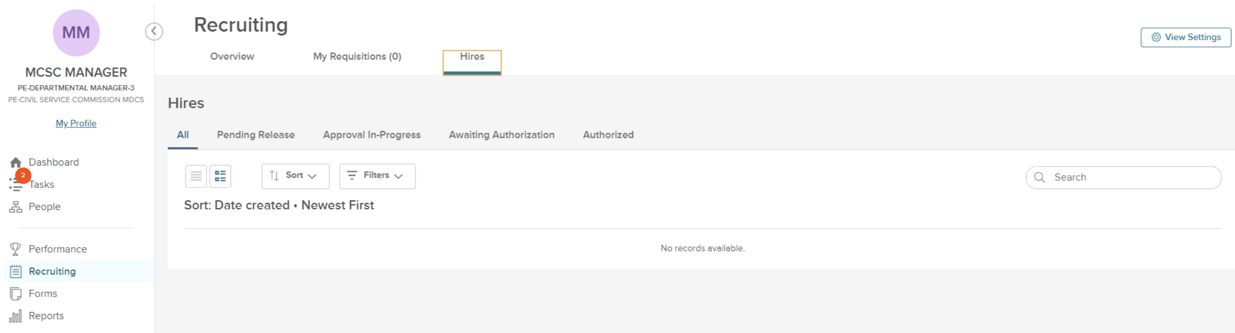
You can also filter by **Department, Division,** or **Date**.



c. **Hires**-if applicable will display **All Hires, Pending Release, Approval in Progress, Awaiting Authorization,** and **Authorized**. These can be sorted by:

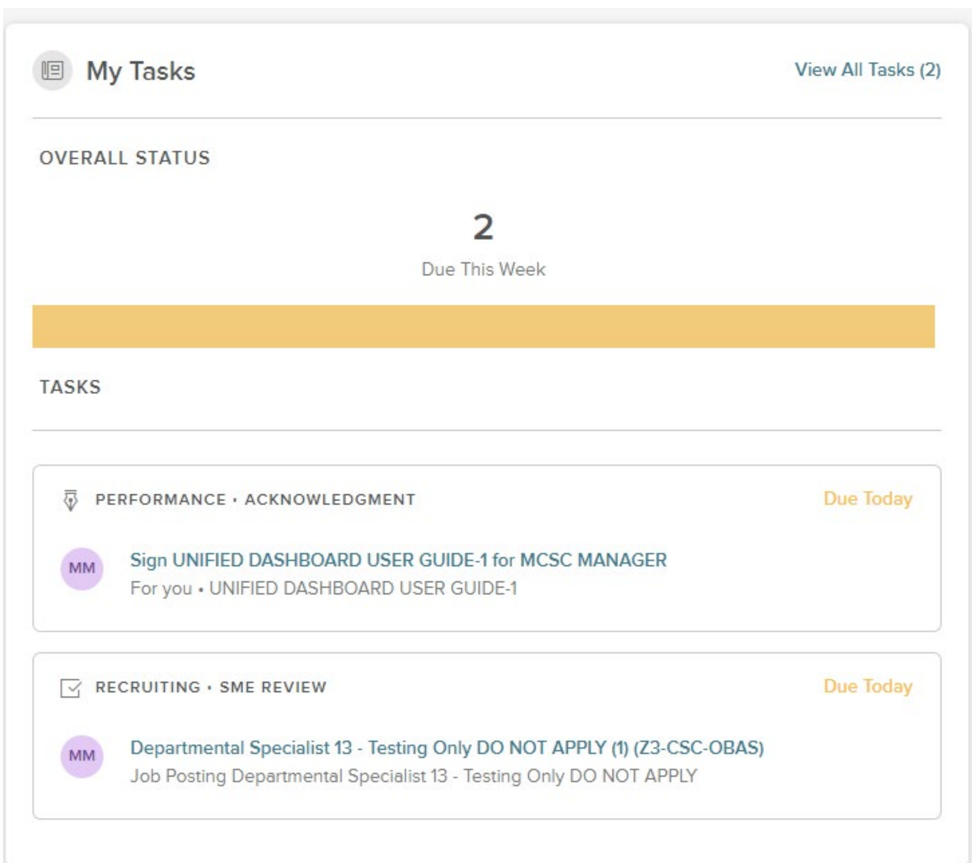
- **Start Date-Newest First** or **Start Date-Oldest First**
- **Name A-Z** or **Name Z-A**
- **Req Number Lowest** or **Highest**
- **Title A-Z** or **Title Z-A**
- **Department A-Z** or **Department Z-A**
- **Division A-Z** or **Division Z-A**
- **Status A-Z** or **Status Z-A**

You can also filter by **Department** or **Division**.

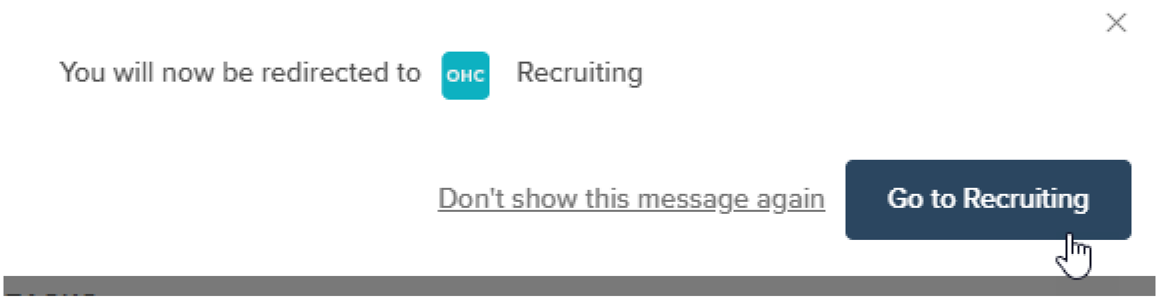


Section 2-My Tasks

My Tasks may display up to 5 tasks spanning all NEOGOV products based on due date, with the earliest displaying first.

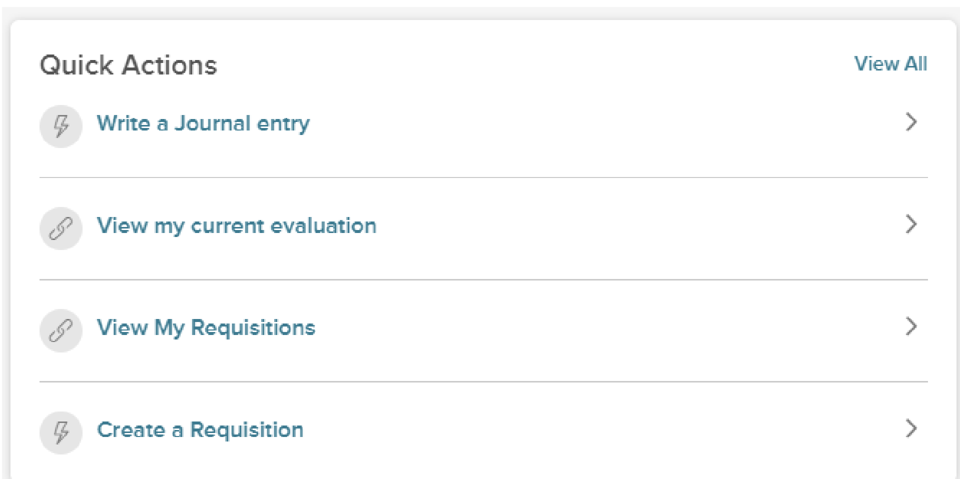


Clicking on a task will direct you to Recruiting and that specific task you clicked on.

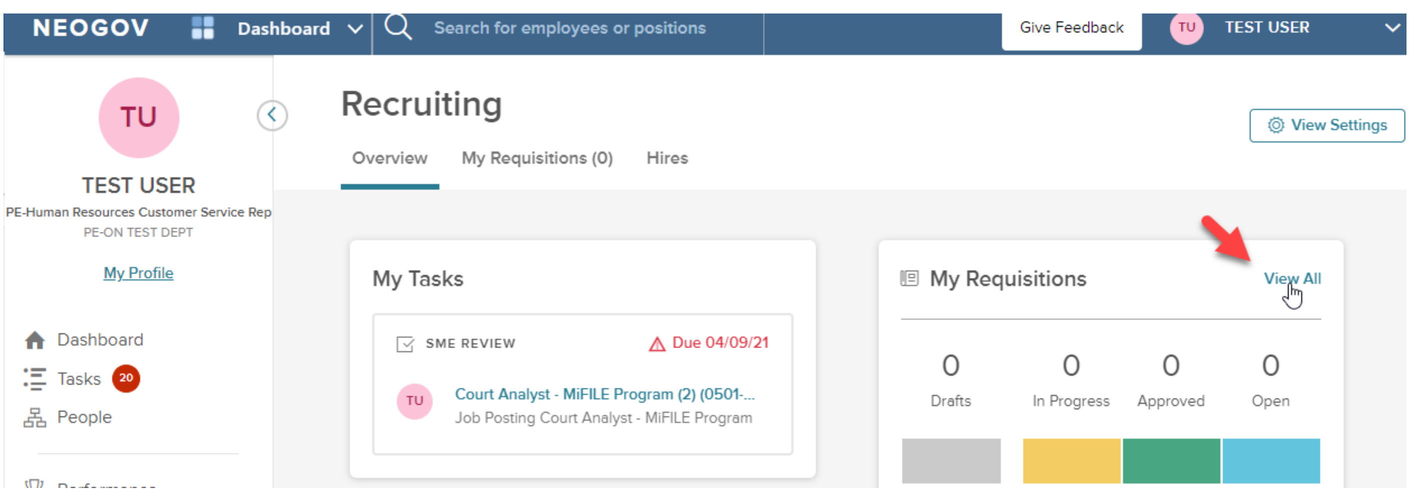


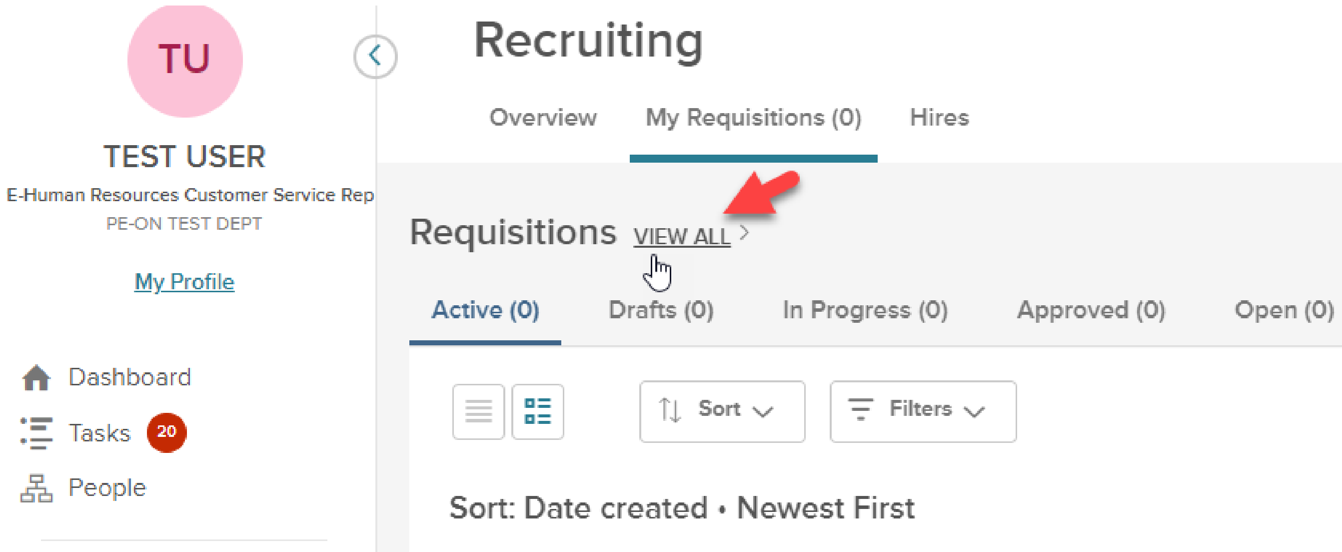
Section 4-Quick Actions

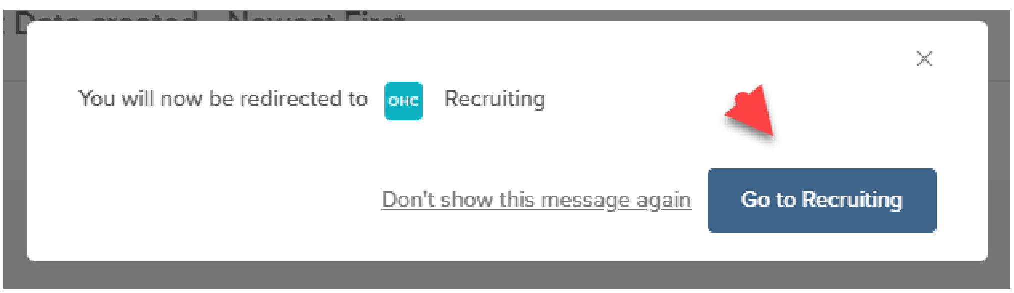
Quick Actions displays quick links to common actions. Options may include: **View My Requisitions,** and **Create a Requisition** based on your security.



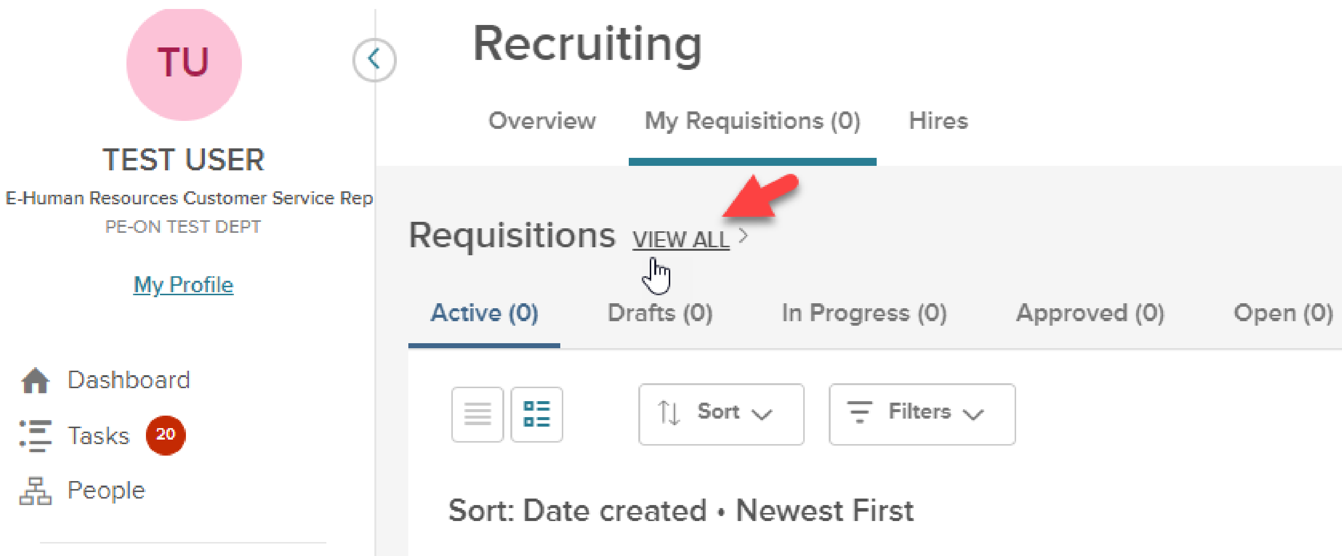
If you do not have any tasks for Recruiting, you can still go to your OHC dashboard by clicking My Requisitions, View All and View All again where you will be directed to Recruiting.

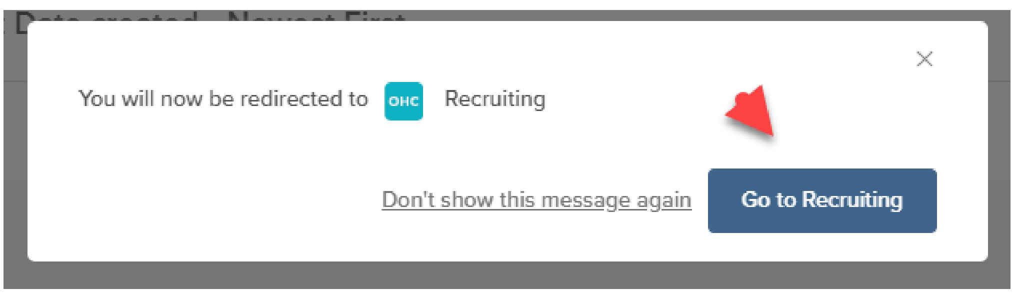



TU
TEST USER
E-Human Resources Customer Service Rep
PE-ON TEST DEPT
My Profile
Dashboard
Tasks
20
People
Recruiting
Overview
My Requisitions (0)
Hires
Requisitions
VIEW ALL
Active (0)
Drafts (0)
In Progress (0)
Approved (0)
Open (0)
Sort
Filters
Sort: Date created • Newest First


You will now be redirected to
OHC
Recruiting
Don't show this message again
Go to Recruiting

YOU MUST TOGGLE OVER TO OHC TO USE THIS PROCESS BY CLICKING ON RECRUITING, VIEW ALL REQUISITIONS. YOU WILL THEN BE DIRECTED TO RECRUITING.





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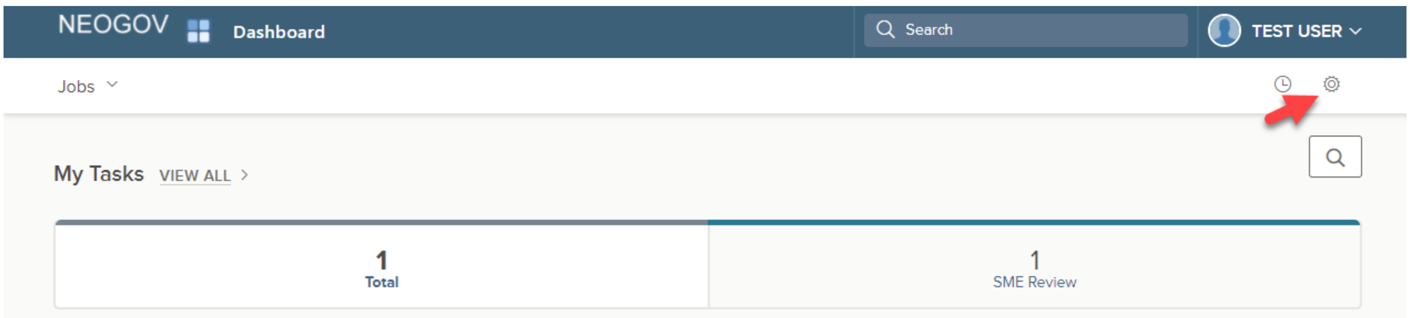
Create an Approval Workflow - Optional

It is now possible to create templates for your various requisitions and hire approval paths!

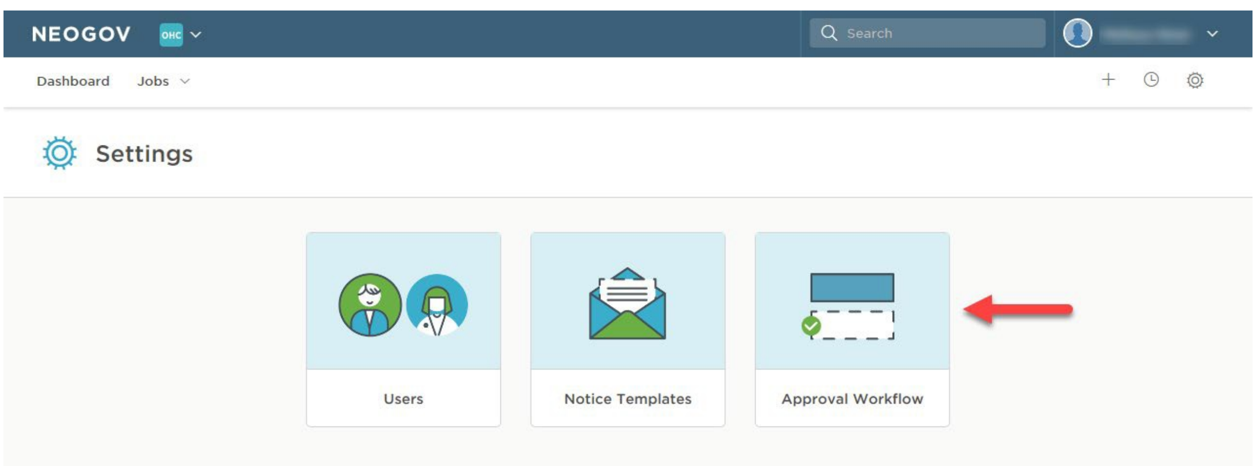
With the OHC role of HR Liaison, you can create and save approval workflows for your assigned department(s).

Steps to Create an Approval Workflow

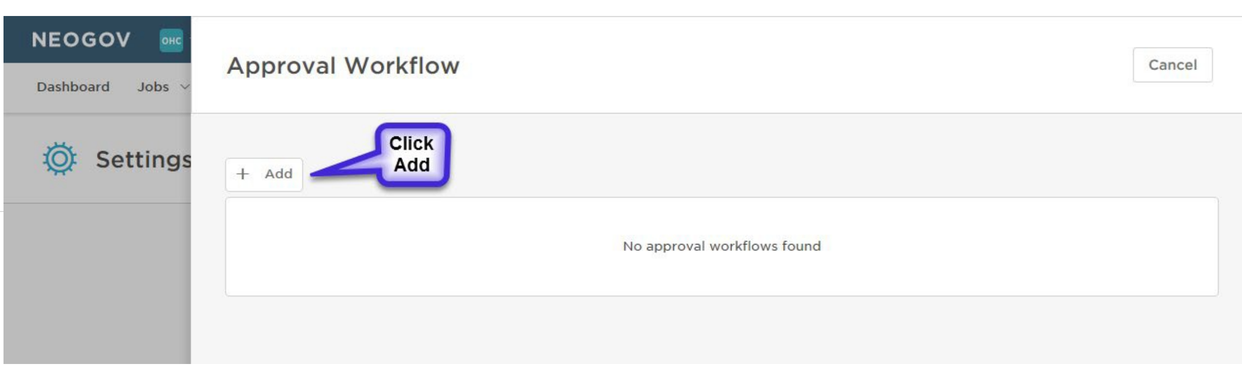
1. Click the gear icon.



2. From the Settings menu, click the **Approval Workflow** Icon.

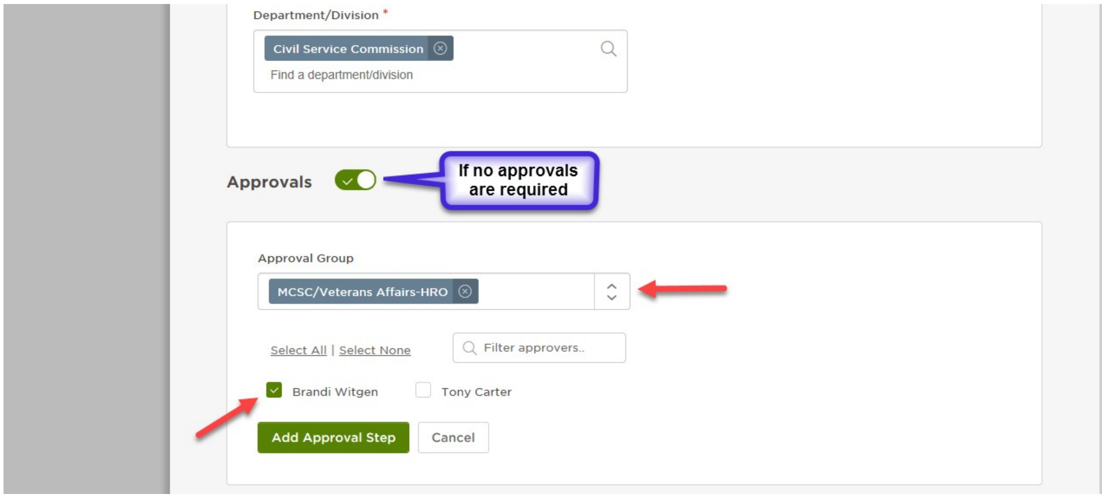


3. A new window will appear. Click the **"+ Add"** button.

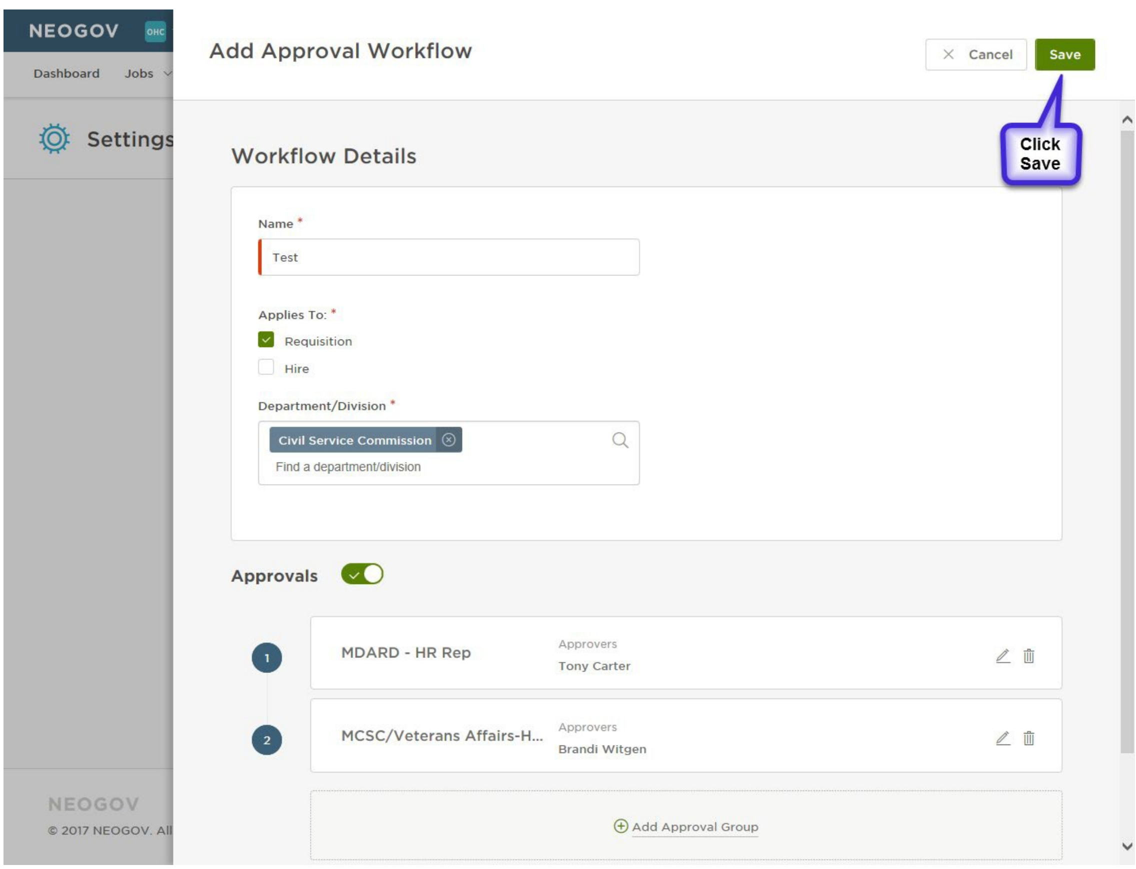


4. Enter a **Name** and make a selection from the **Applies To** field. Then, click the magnifying glass to search and select all applicable departments/divisions.

5. Once a selection has been made in the **Department/Division** field, use the **Approval Group** drop-down to find approvers and **Add Approval Step.** If no approvals are required, select the checkmark toggle next to **Approvals**.



6. Repeat these steps for each remaining approval group.
7. To adjust the order of approval groups, drag and drop each group to the desired location.
8. Click **Save** to add your approval workflow.

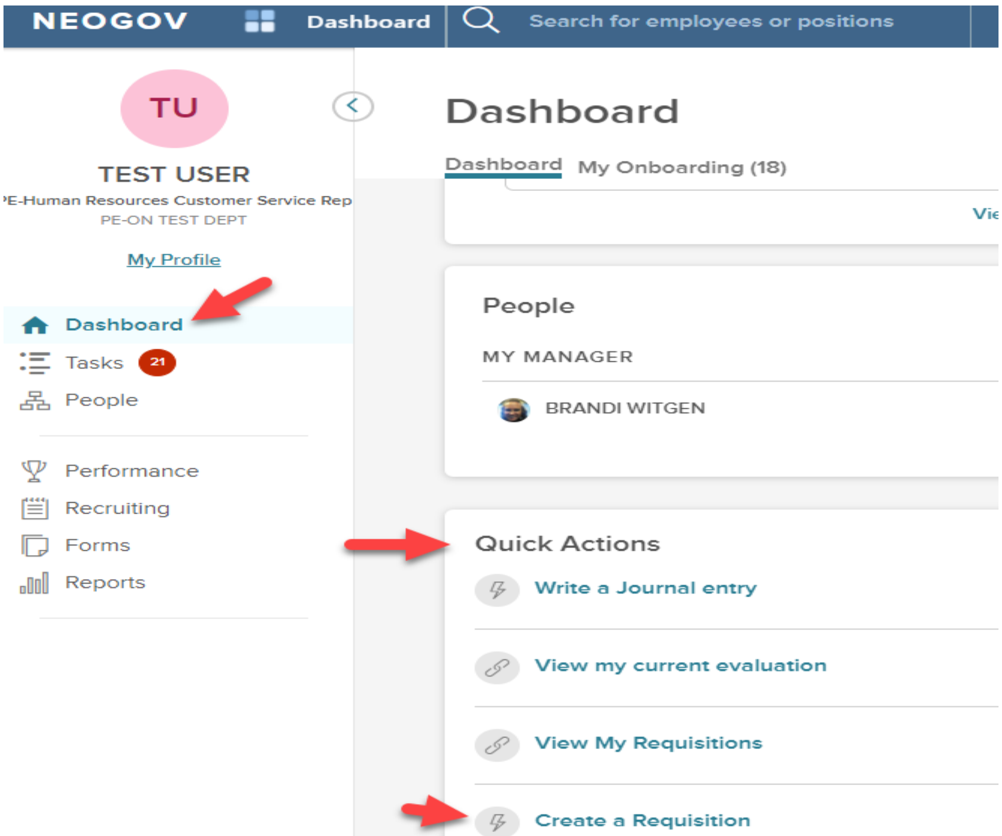


Create a Requisition

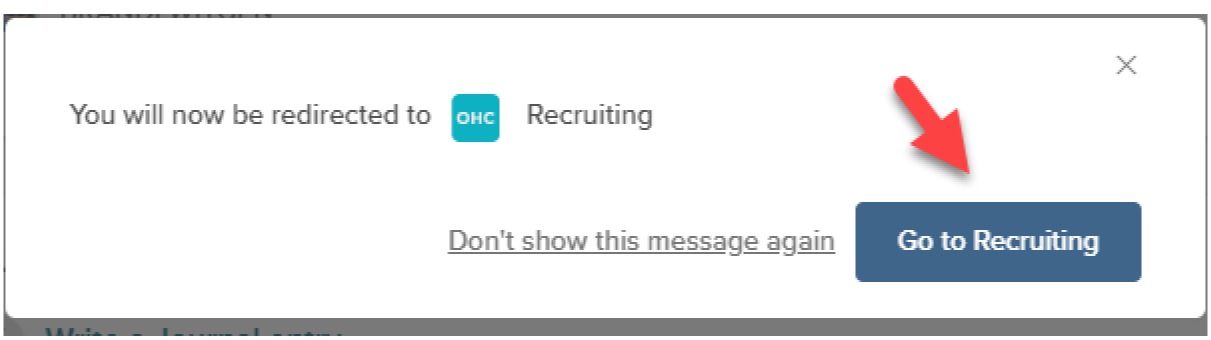
With the OHC role of Originator or HR Liaison, you can create a requisition.

When a hiring department has an open position, they will submit a requisition as a request to fill the vacancy.

From the **Unified Dashboard** use the **Quick Actions** and click on **Create a Requisition**.

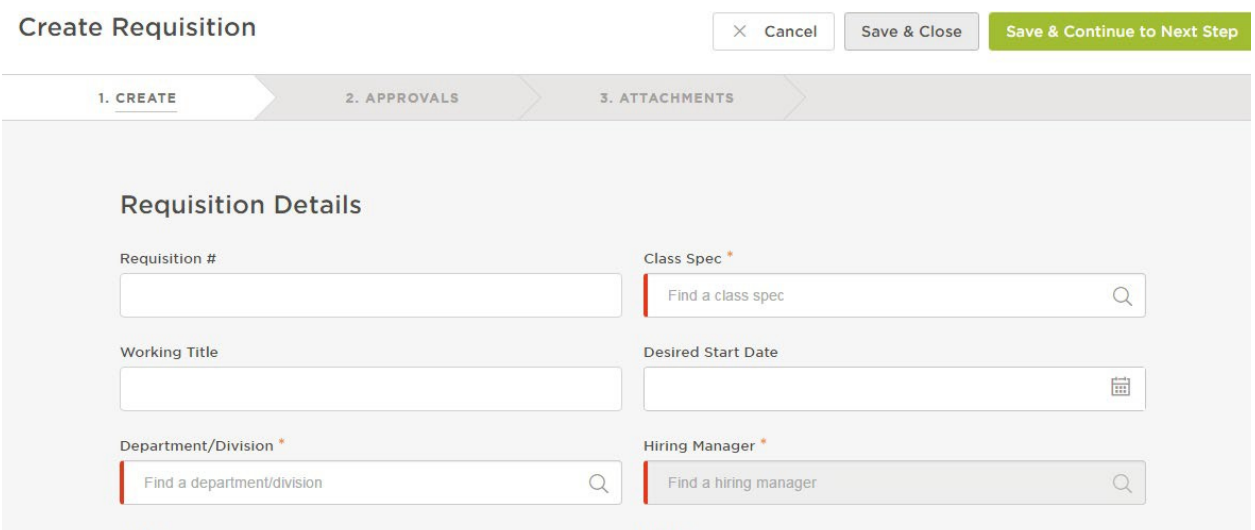


You will be directed to **Go to Recruiting**



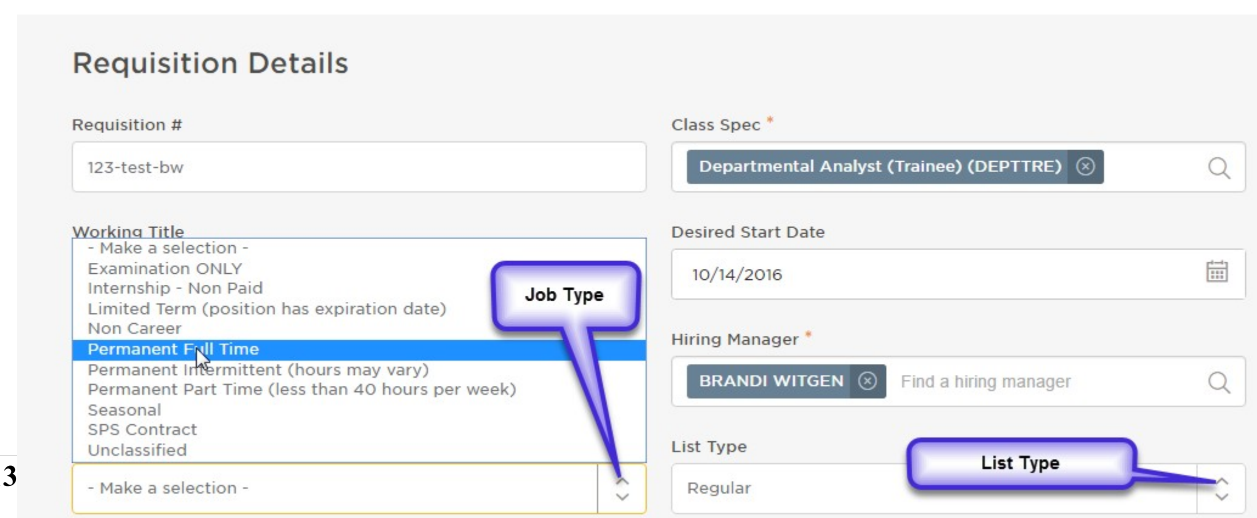
Steps to Create a Requisition

1. The first of three requisition form pages will display.

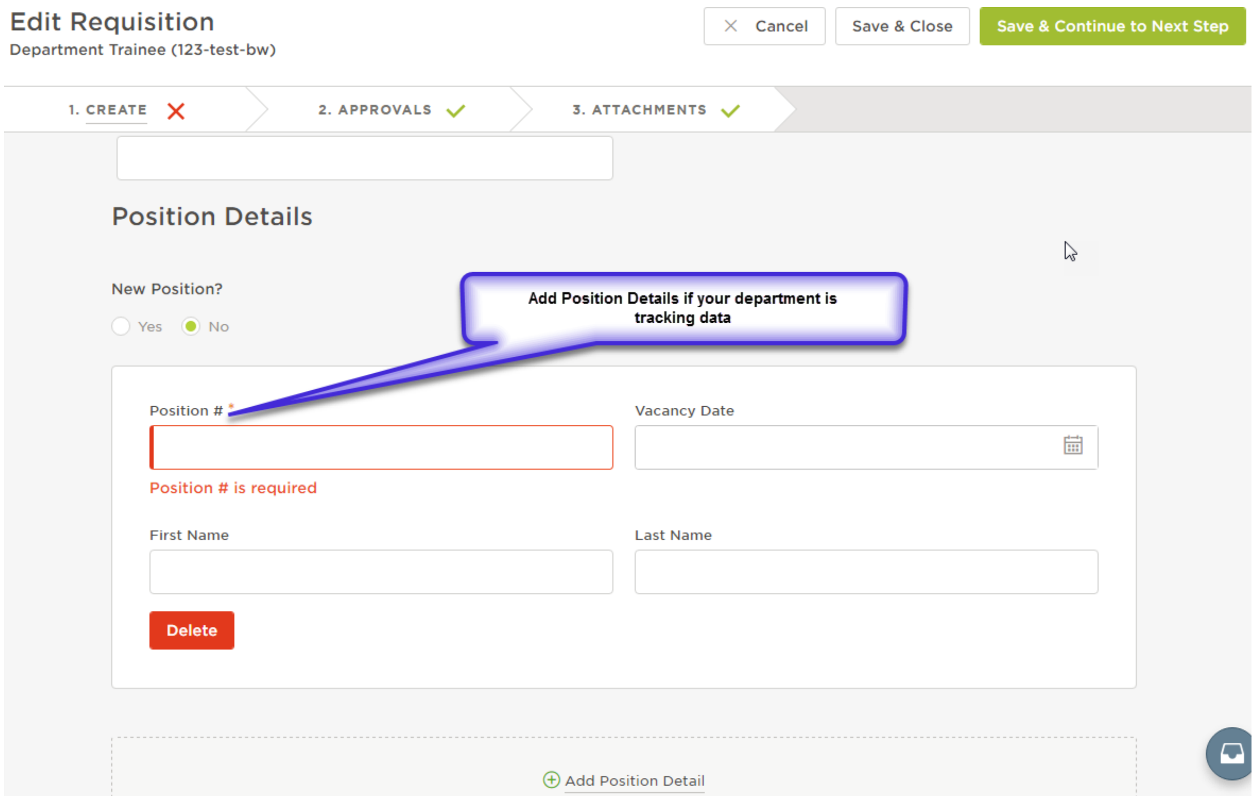


2. In **Job Type**, select the appropriate job term from the drop-down (choices are Examination ONLY, Internship – Non-Paid, Limited Term, Non-Career, Permanent Full Time, Permanent Intermittent, Permanent Part Time, Seasonal, SPS Contract and Unclassified).

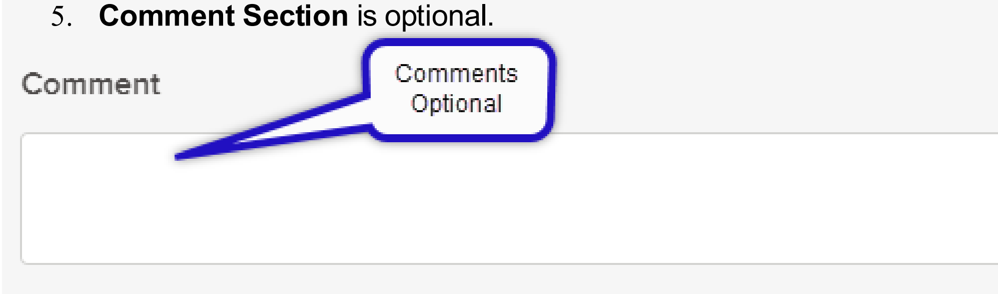
3. In **List Type**, select the appropriate list type from the drop-down (select from Regular, Promotional Only, Departmental Promotional Only, Regular, and Promotional or Transfer).
    a. Choose **Regular** for postings open to the general public.
    b. Choose **Promotional Only** for postings open to State employees only.
    c. Choose **Departmental Promotional Only** or **Transfer** for postings open only to department employees.



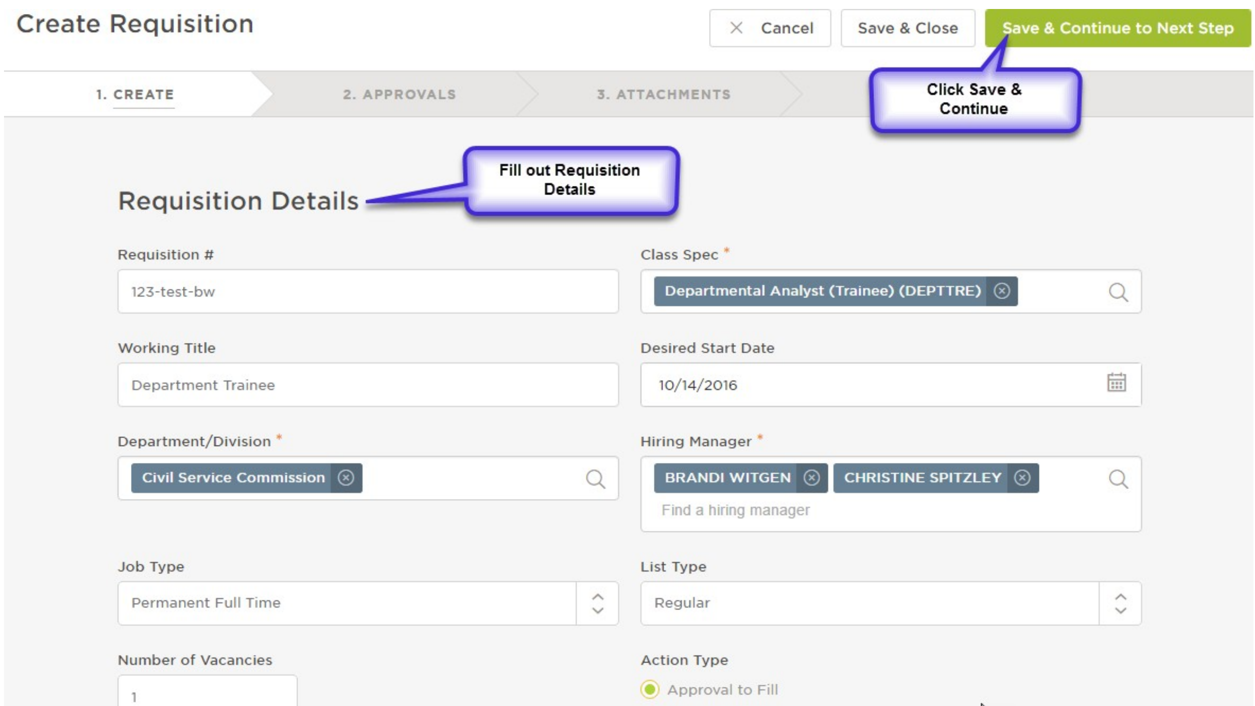
4. In **Position Details**, if the vacancy is for an existing position and the department tracks data on previous employees, click the **Add Position Detail** button and enter the **Position #, First Name, Last Name,** and **Vacancy Date**. Click the **Add Position Detail** button again to add any additional vacancies.



5. **Comment Section** is optional.



6. Complete the requisition details, click **Save & Close if you want this requisition to stay in "draft" status for future editing.** If you are complete with the requisition process, click **Save & Continue to Next Step**. (Requisitions in **Save & Close** status only, can be edited)



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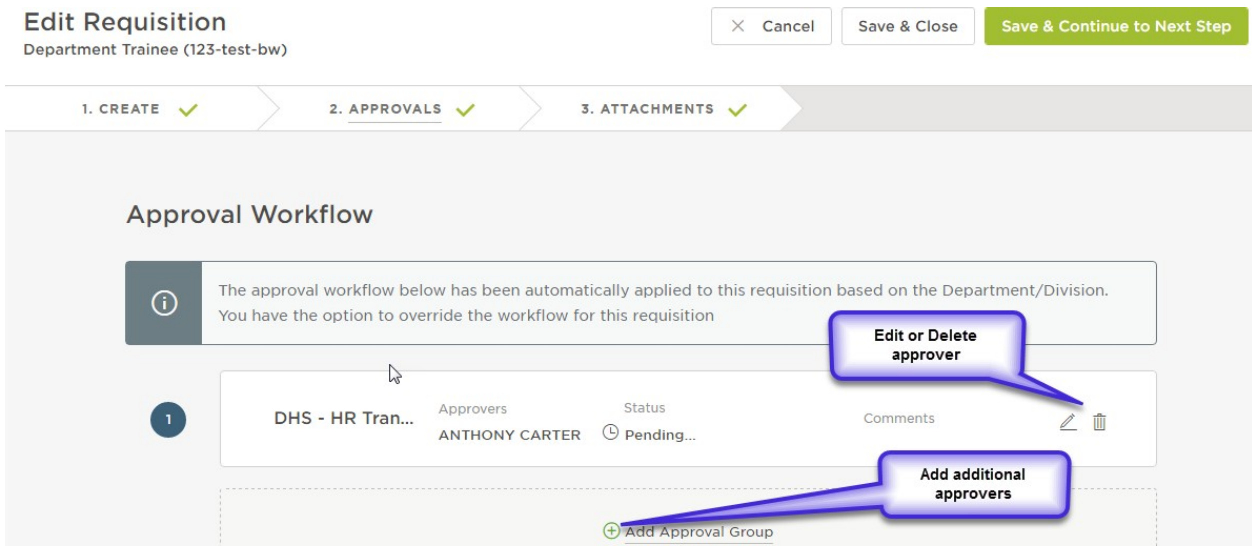
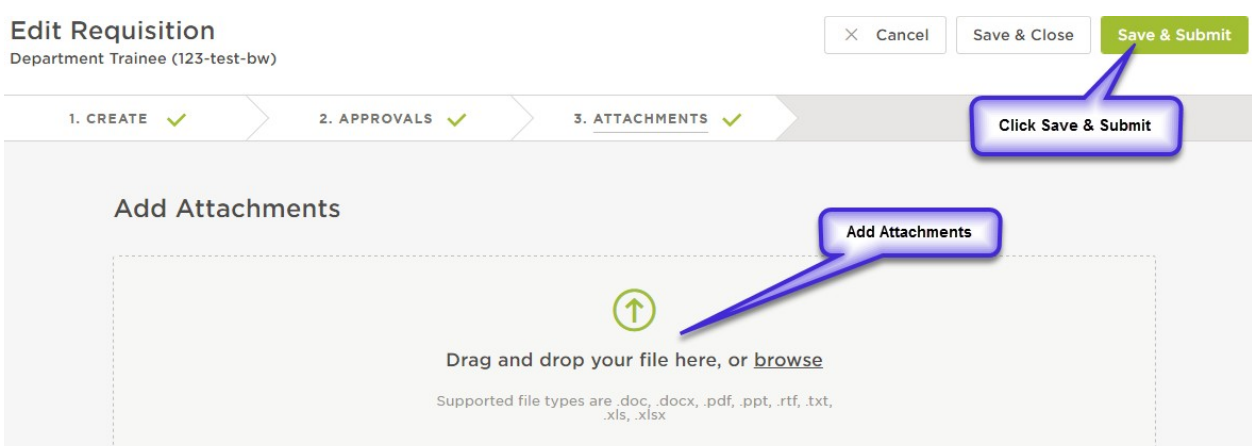
7. If you have an approval workflow template, it will display on the second requisition form page. If necessary, you can edit the approval workflow. Updating changes to your workflow only applies to your current requisition and not the saved approval workflow template. You have the option to edit/delete approvers as well as adding approvers during this process. During this process, you also have the option to re-order the approvers by using drag and drop features.



Click Save & Continue to Next Step.

8. Drag any file attachments to the third requisition form page and click **Save & Submit**.



Note: If you are not quite ready to submit the requisition, click Save & Close. The requisition will display on your dashboard page in the My Requisitions section as a draft.

Approve a Requisition

If you have been assigned the OHC role of Approver, you can review a requisition sent to you for approval.

Like the previous version of the OHC, the selection of approve, deny and on hold are available. The Cancel selection is no longer available for approvers. A requisition must be cancelled by the person that created it or someone with the role of HR Liaison. If a requisition has been approved, it can be cancelled by an HR staff member with Insight role.

Requisition Approval Path Example

In the example below, the defined approval path requires the requisition to travel through a total of four approval groups before going to HR.

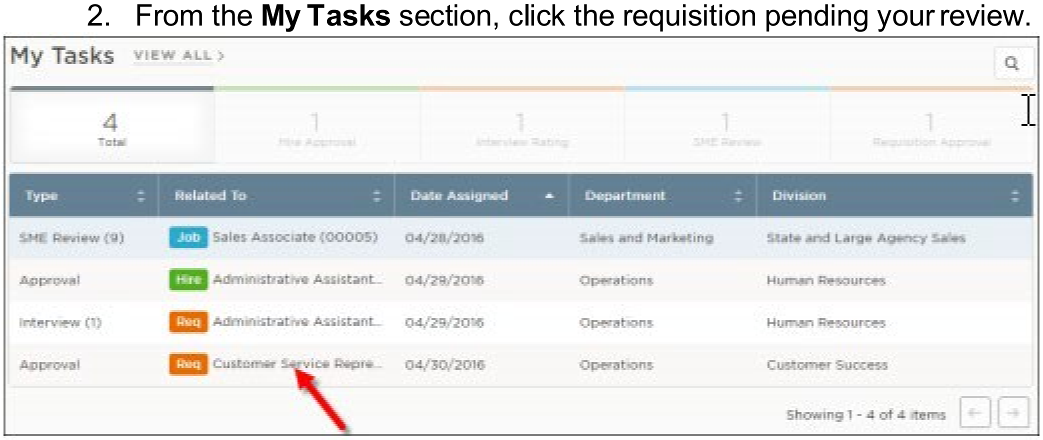
Once the requisition creator clicks Save & Submit, the requisition will go to the first approval group. In this example, both approvers in Group 1 will be notified via email for their review. Like the previous version of the OHC, approval is on a first come first approve basis. Approvers from Group 1 will need to approve the requisition to move it to the next approval group.

Approval Group	Selected Approver(s)
Group 1: Manager	Simon Davies and Melanie Scott
Group 2: Director	Joyce Lowe and Mark Campbell
Group 3: Budget	Nancy Reed
Group 4: President	Drake Thomas

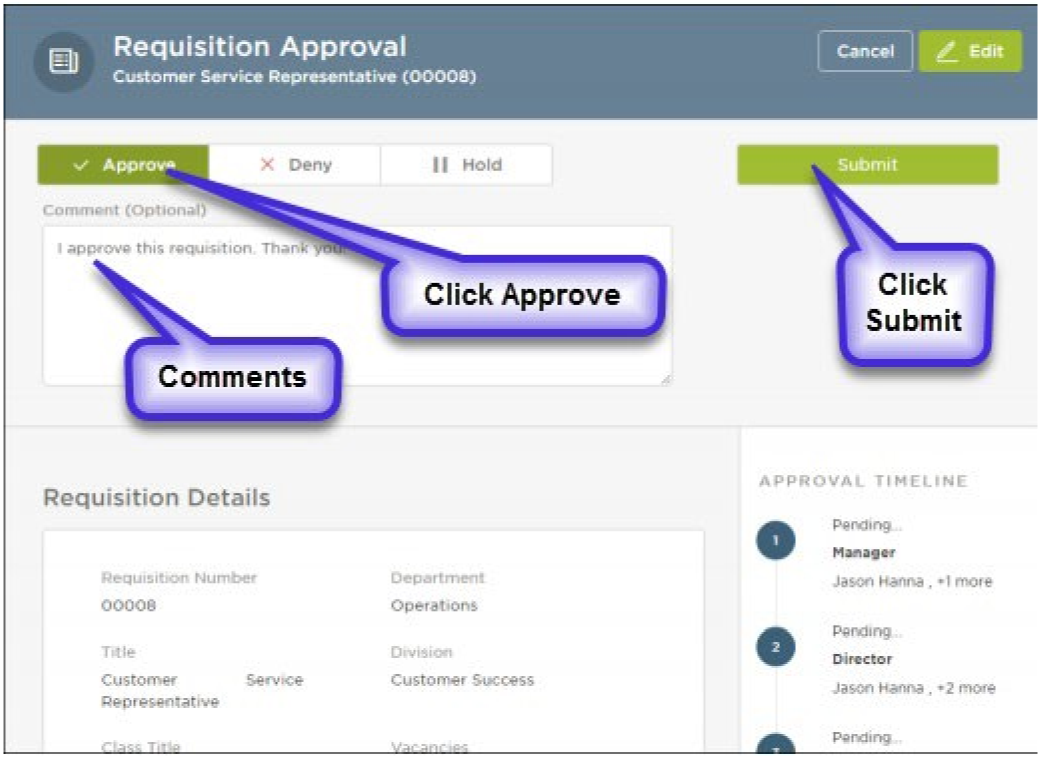
Steps to Approve a Requisition

1. If you are not already viewing your dashboard page, click **Dashboard** from the upper left.

2. From the **My Tasks** section, click the requisition pending your review.



3. Click **Approve**, type any comments (optional), and click **Submit.**



4. If you are testing the approval workflow process, you may be an approver for multiple approval groups. In this case, repeat these steps until the requisition has been approved by all groups and sent to HR.

Complete a SME Review

With the OHC role of SME, you can complete a SME review. SME reviews are used when HR enlists the expertise of their organization's subject matter experts (SMEs) to assist with the candidate selection process. The application of a SME review ranges from a simple pass/fail rating with a single reviewer, to a scored assessment with a panel of multiple reviewers. Unlike the previous version of the OHC, the new version does not allow an assigned SME to return back to a previously rated candidate and change their rating/score. The assigned SME will need to consult with an HR staff member that has Insight access to change ratings/scores.

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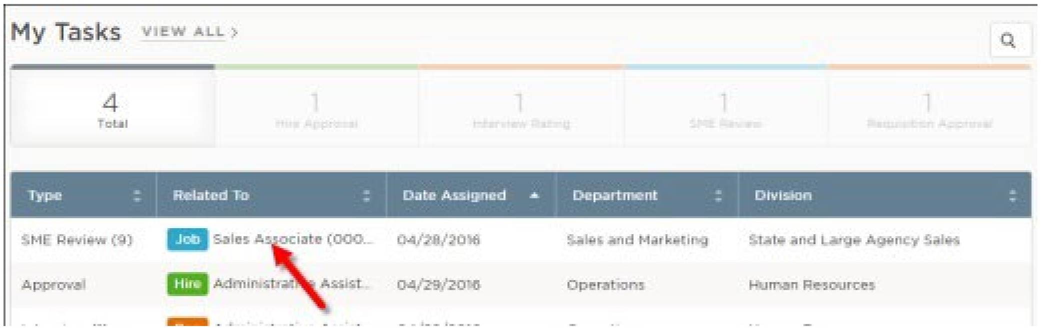
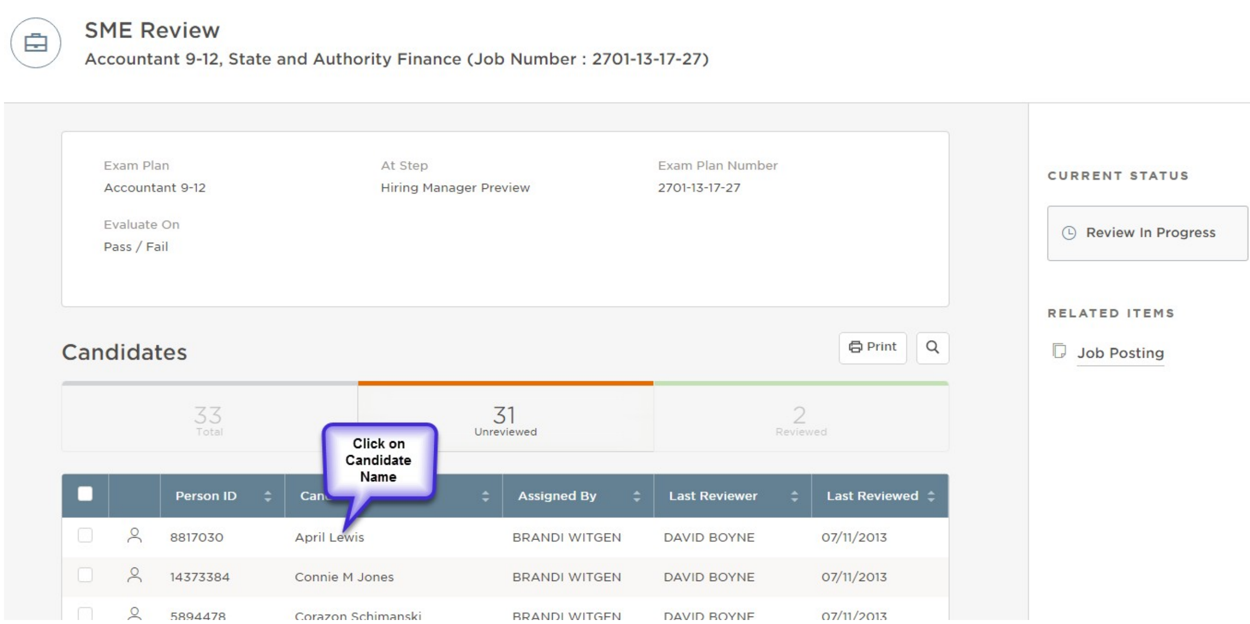
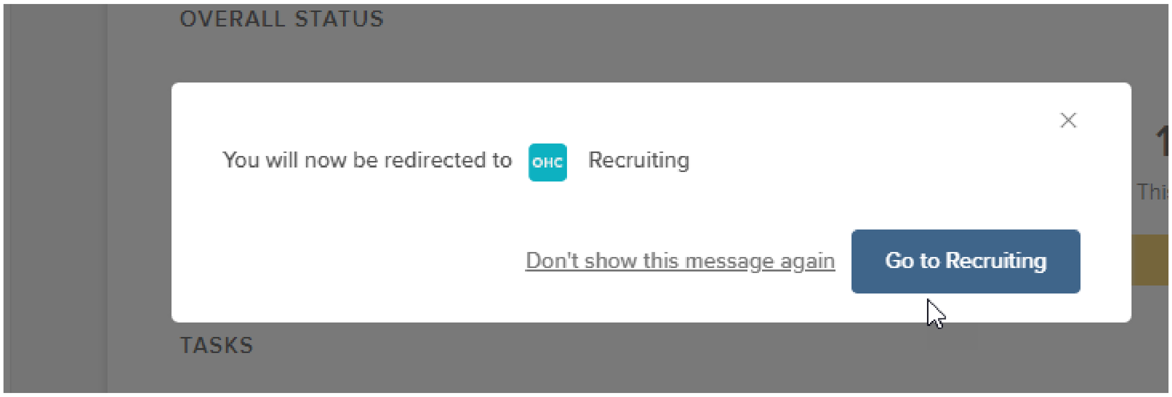
Steps to Complete a SME Review\

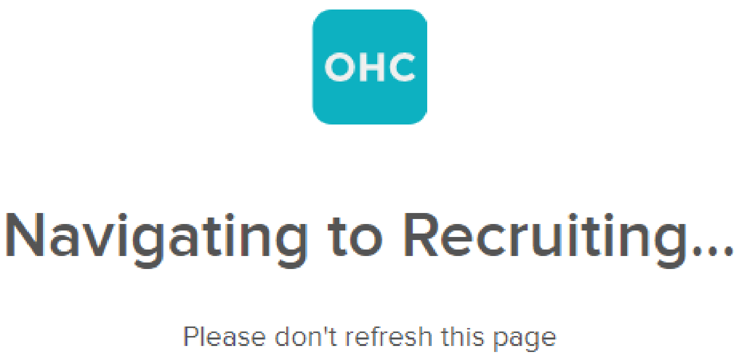
1. **Click on Tasks from the Unified Dashboard Section to find your tasks associated with the recruitment process (SME/Candidate Review)**





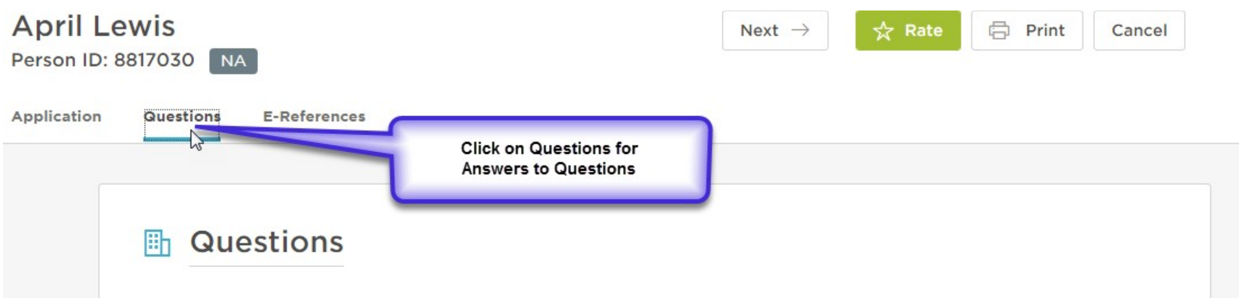
1. From the **My Tasks** section, select the job for which you would like to complete a SME review where you will be directed to Recruiting to complete the task.



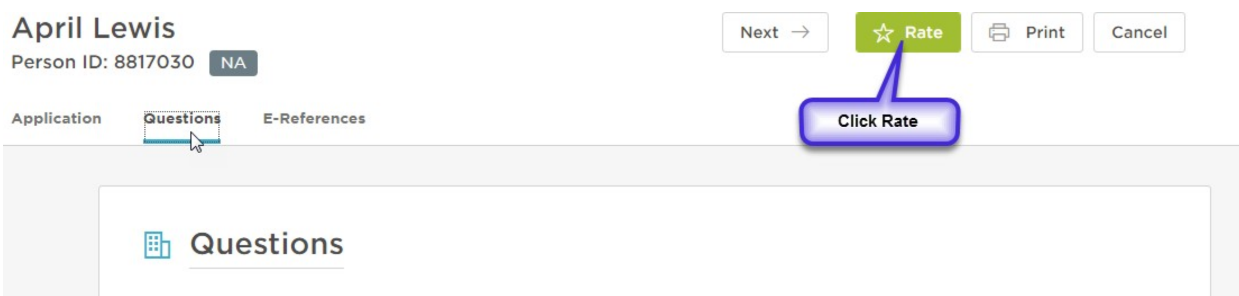


2. Click the name of the first candidate to be reviewed.

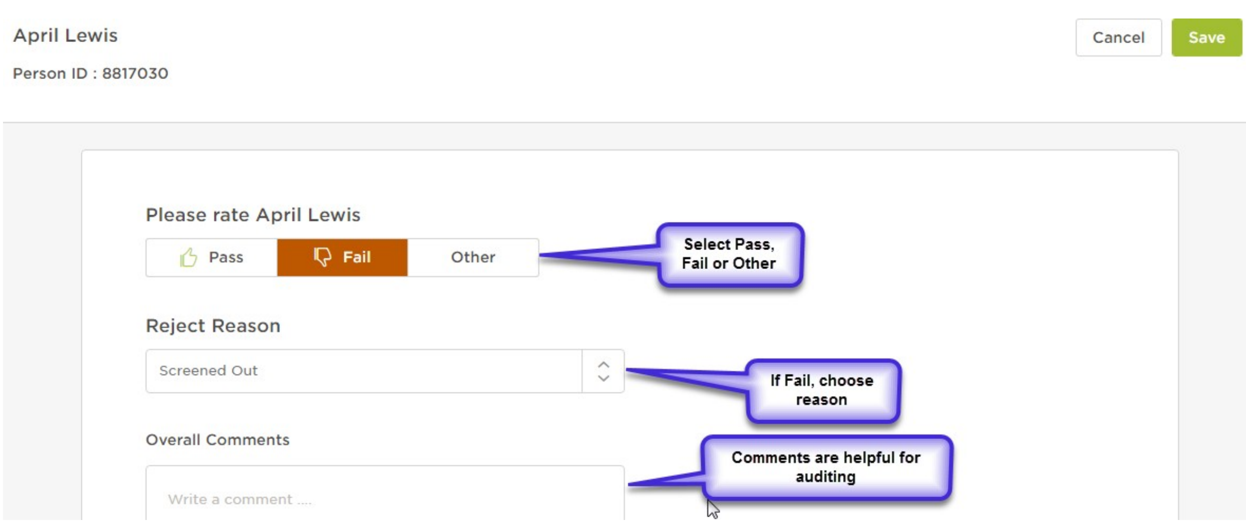
3. The candidate's application will display contact information, work experience, education, and other information. Click the **Questions** tab to review the candidate's responses to agency-wide and job-specific supplemental questions.



4. Once you have completed your review click **Rate**.



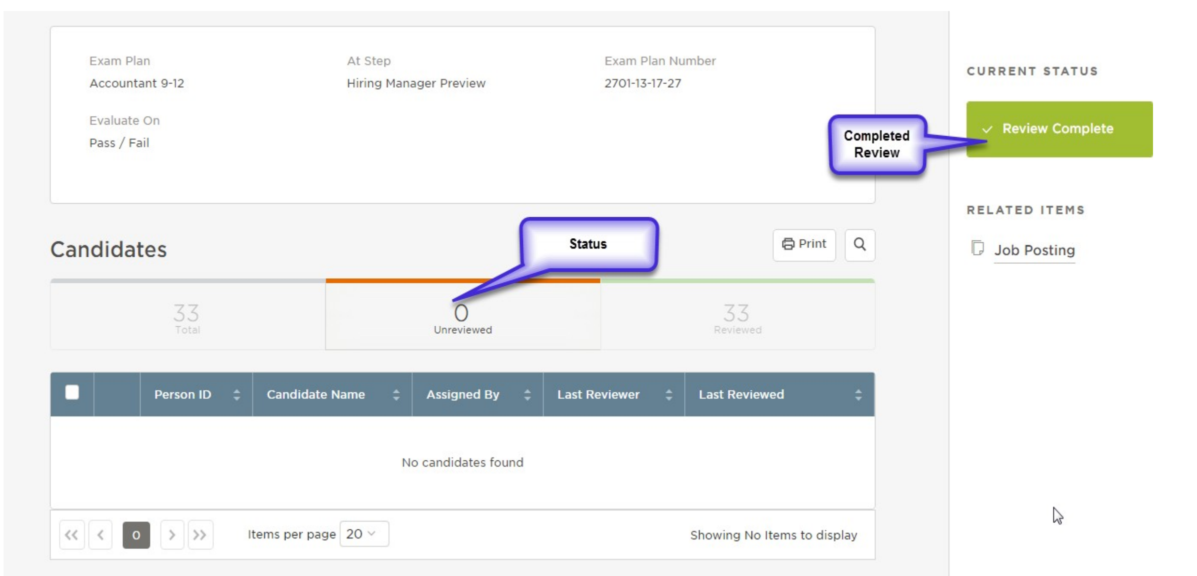
5. There are three rating options in a pass/fail setting: Pass, Fail and Other. Select one of these ratings and click **Save**.



6. Click **Next** to proceed to the next candidate pending your review.

7. Repeat these rating steps until **Next** no longer displays. Click **Cancel** or click anywhere to the left of the last candidate's application review page.

8. Notice you have no unreviewed candidates, and your SME review status is complete.



Set up a Notice Template

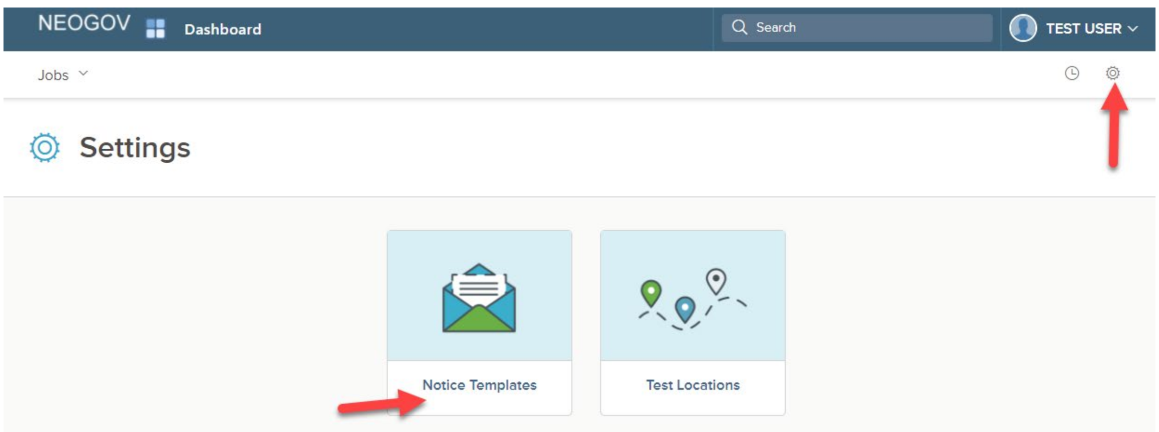
With the OHC permission of Create OHC Notice Templates, you can create a notice template for your assigned security permissions (department(s)).

Notice templates can be used for a variety of notice types including interview scheduling, assessment results, candidate rejection and job offer.

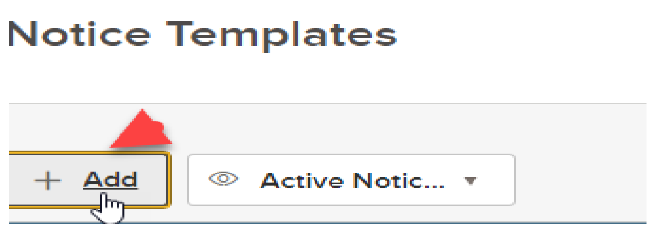
Steps to Set up a Notice Template

1. On the NEOGOV Dashboard, click the **Settings** icon

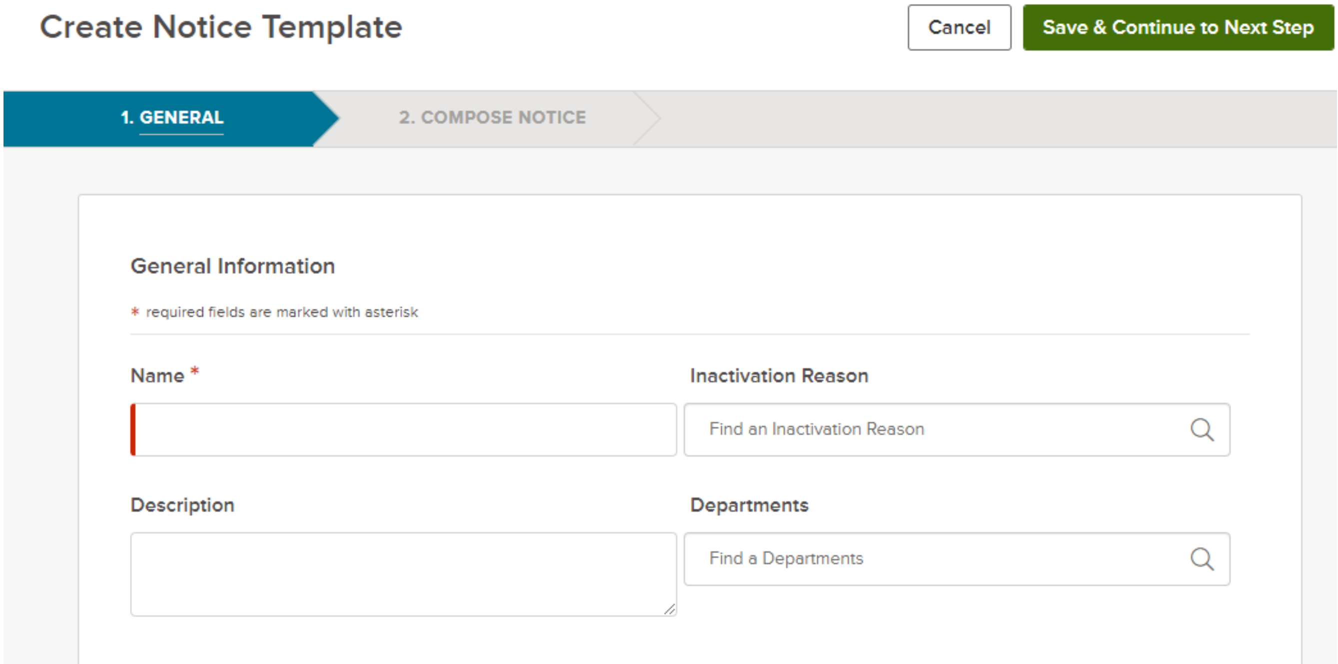
2. On the Settings menu, click the **Notice Template icon**



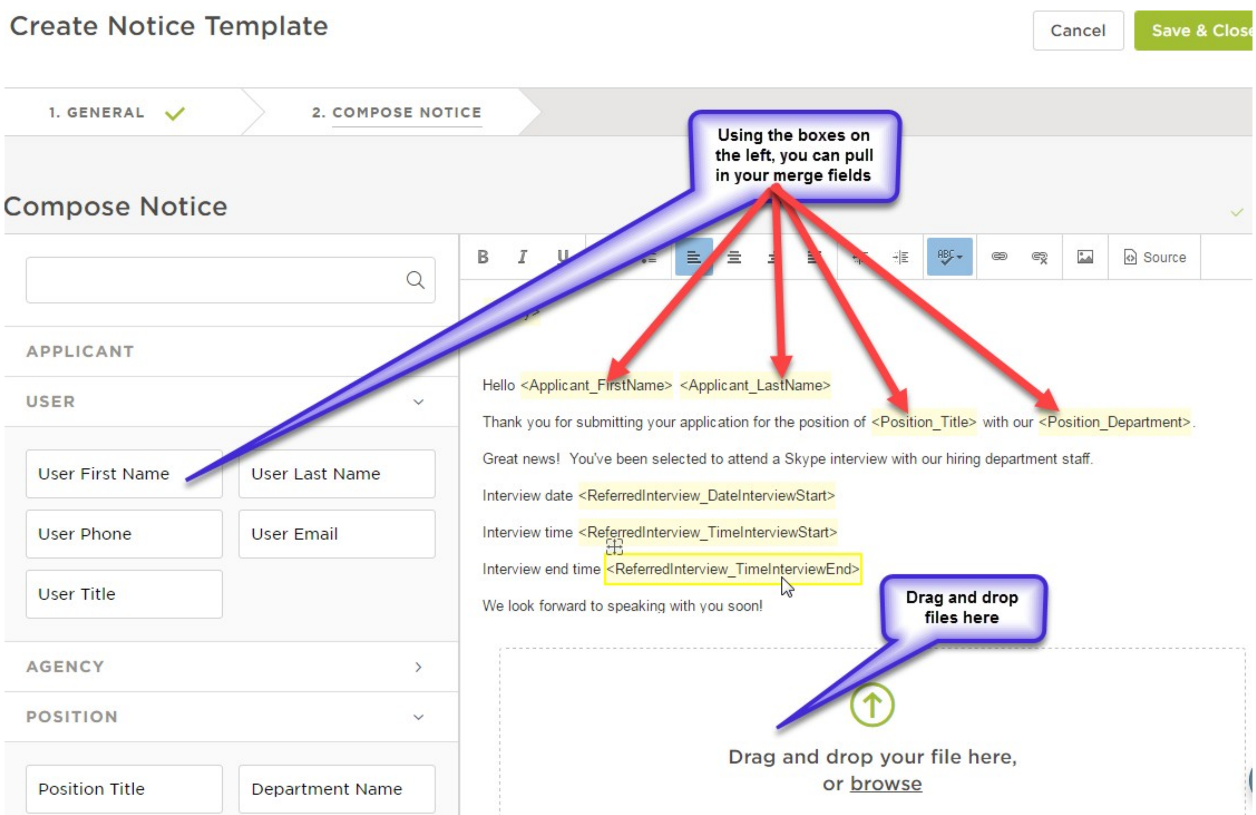
3. Click **Add**.



4. Complete the notice template page and click **Save & Continue** to Next Step.


Create Notice Template
Cancel
Save & Continue to Next Step
1. GENERAL
2. COMPOSE NOTICE
General Information
* required fields are marked with asterisk
Name *
Inactivation Reason
Find an Inactivation Reason
Description
Departments
Find a Departments

5. Type the contents of your notice template. When a merge field is required, locate it using left-side search and then drag to the proper area of the notice. Also, drag any applicable files to the attachments section.



Note: In the previous version of the OHC, inserting a merge field was a process of either typing or copying and pasting, from left angle bracket (<), e.g., <Applicant_LastName>. With the new OHC, dragging the merge field to the notice body is all that is required. Typing or copying and pasting the merge field will not work properly.

6. Once you are done, click **Save & Close**.

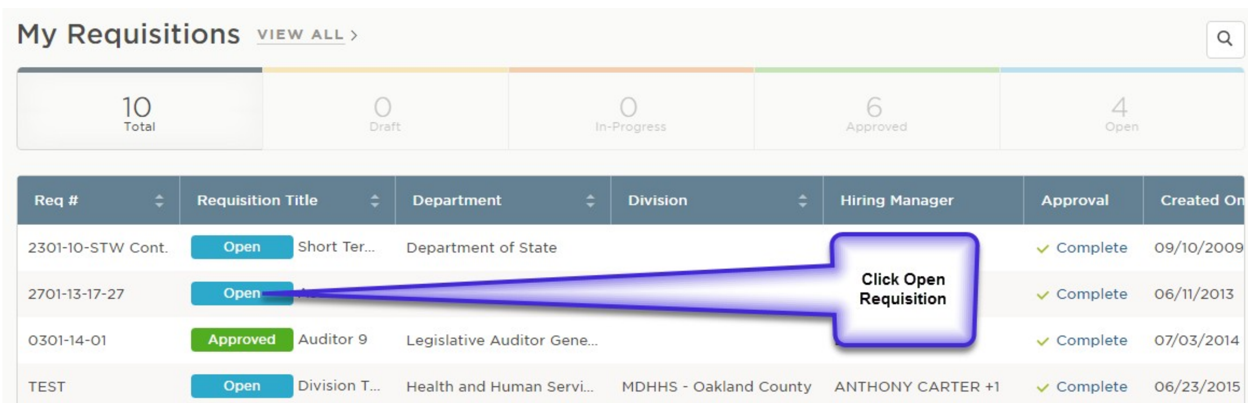
Schedule Interviews

With the OHC role of Hiring Manager or HR Liaison you can schedule interviews.

Steps to Schedule Interviews

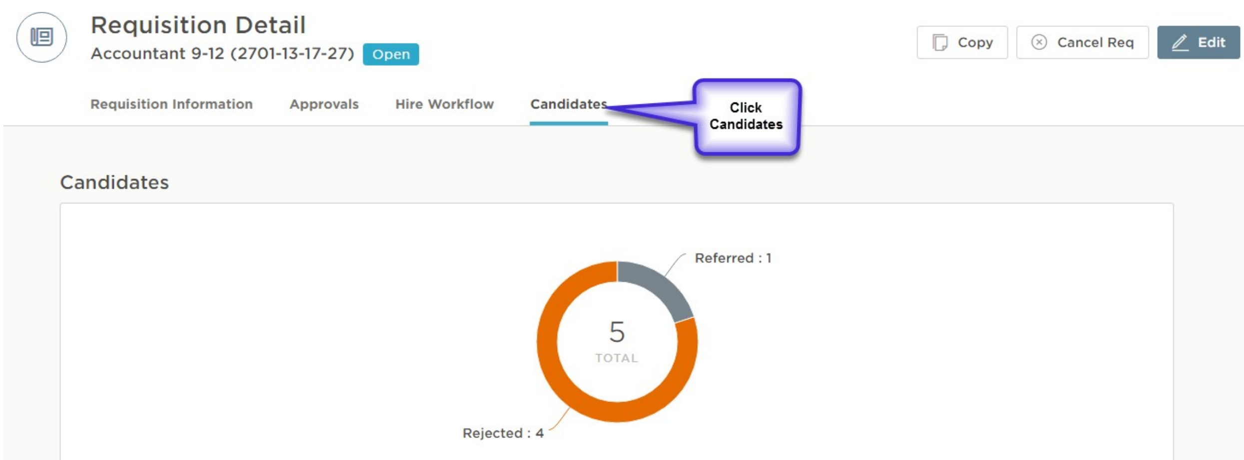
1. If you are not already viewing your dashboard page, click **NEOGOV** from the upper left.

2. From the **My Requisitions** section, click the open requisition that requires you to schedule interviews.

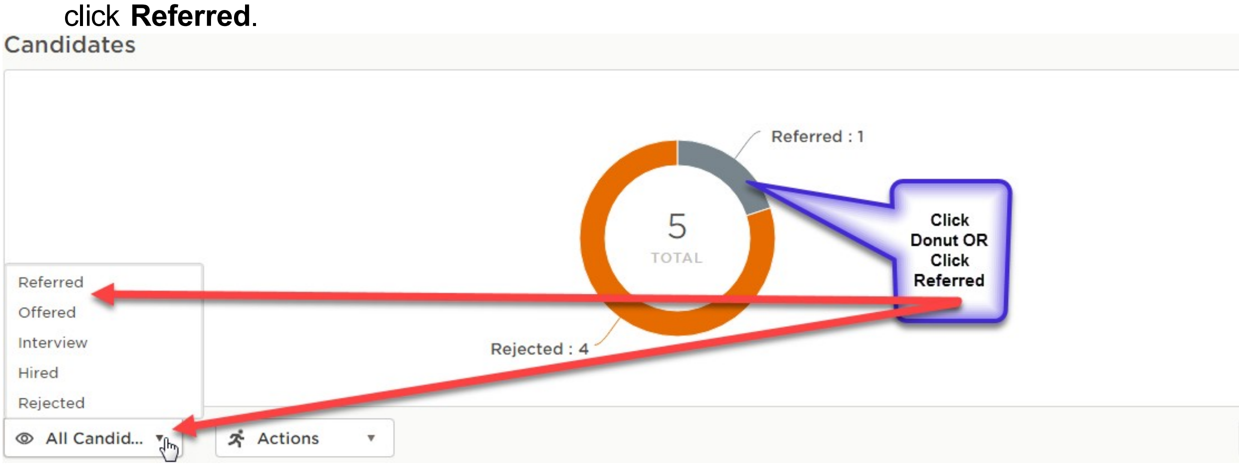


Tip: Click the candidate count to save an extra click and immediately view the referred list.

3. If you are not already on the candidate's page, click the **Candidates** tab.

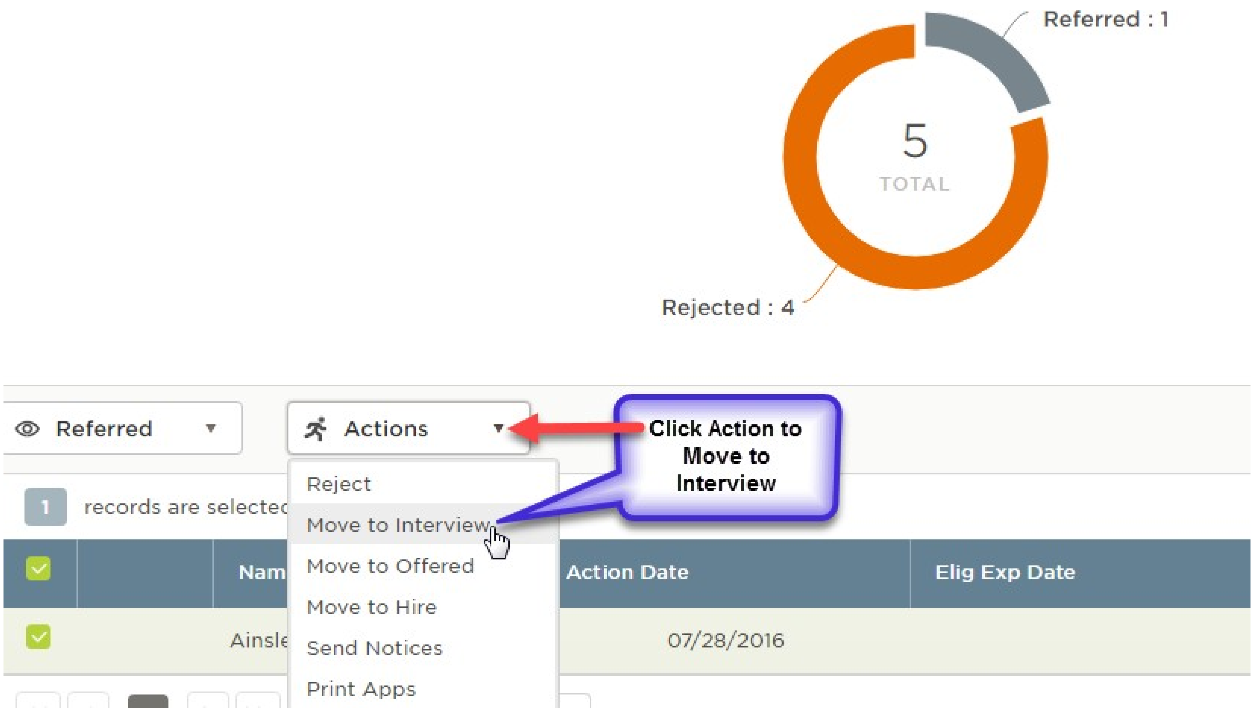


4. You are now viewing the referred list. To schedule interviews, the view must be switched to referred candidates. On the doughnut chart, click **Referred**, or on the **Candidates** menu, click **Referred**.

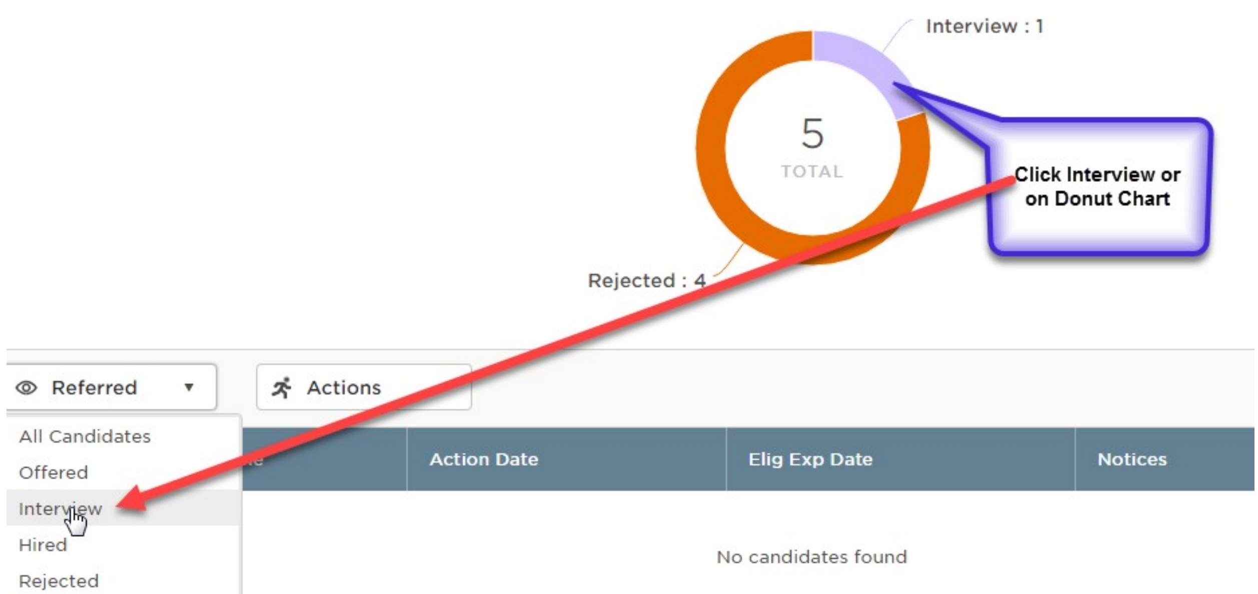


5. Select the candidates that will be moved to the interview step.

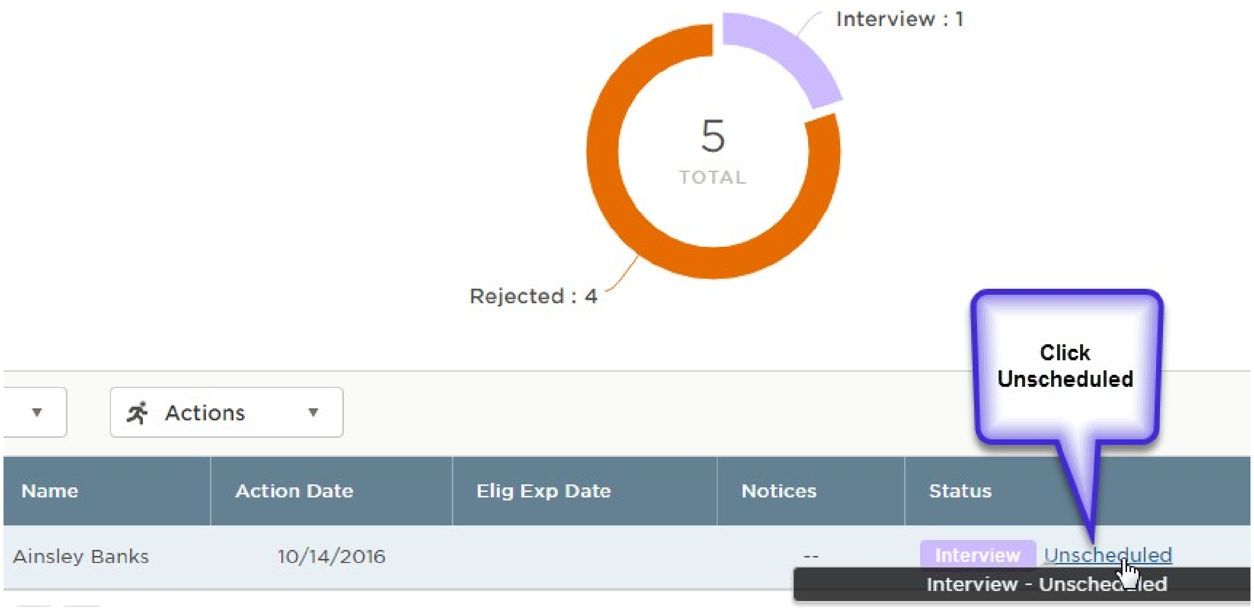
6. On the **Actions** menu, click **Move to Interview**.



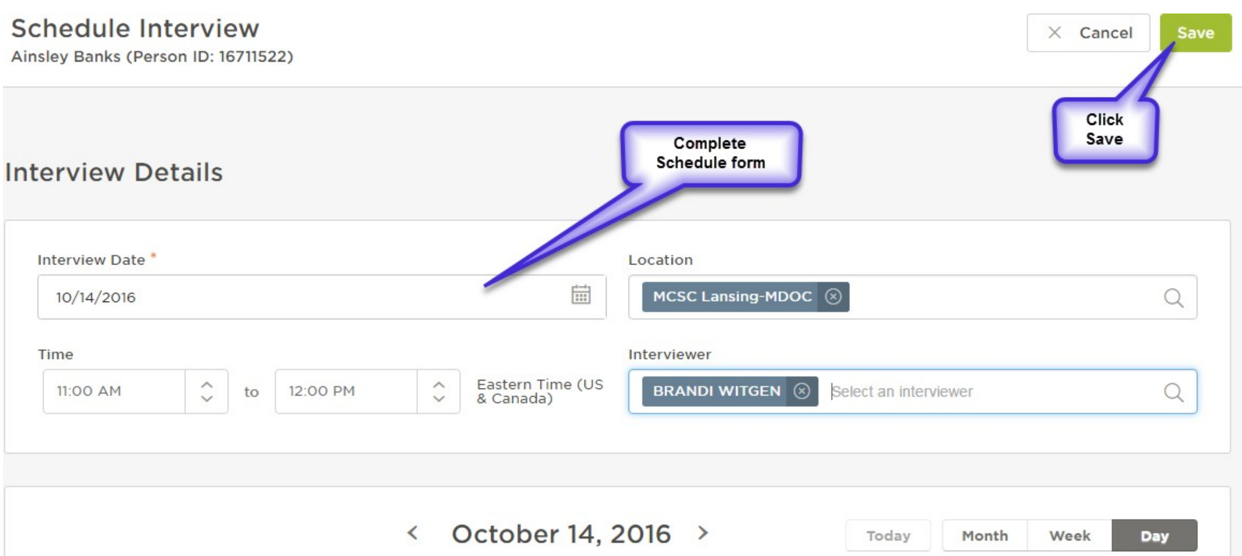
7. Click **OK** to confirm moving the candidates.
8. On the doughnut chart, click **Interview**, or on the **Candidate** menu, click **Interview**.



9. From the first candidate to be scheduled for an interview, click **Unscheduled**.



10. Complete the schedule form and click **Save**.



Note: The Interviewer field displays all users with the OHC role of Rater – spanning all departments/divisions - yielding a flexible rating platform for your entire organization.

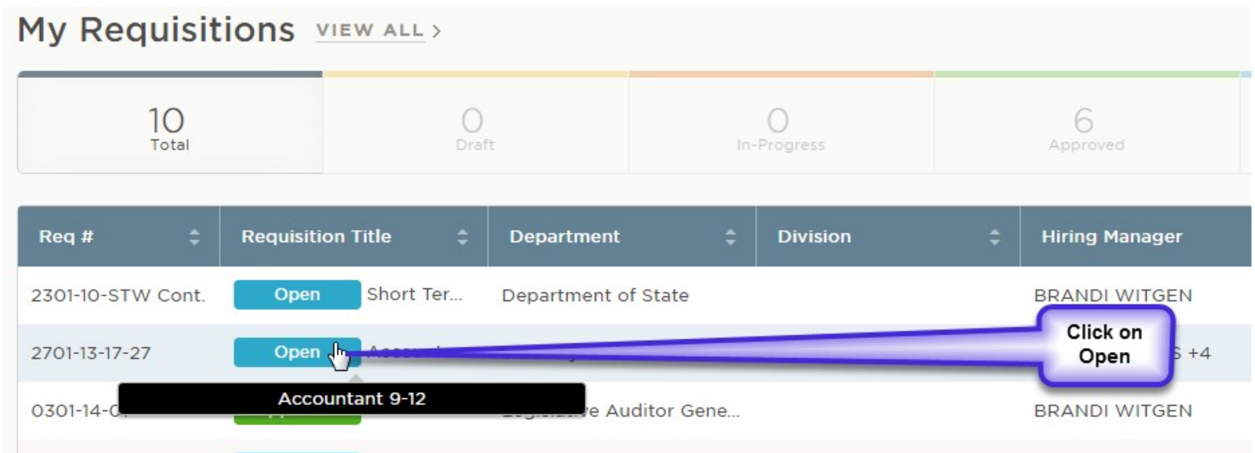
11. Repeat these steps to schedule the remaining candidates for interviews.

Send Notices

With the OHC role of Hiring Manager or HR Liaison and the OHC permission of Send OHC Notices, you can send notices.

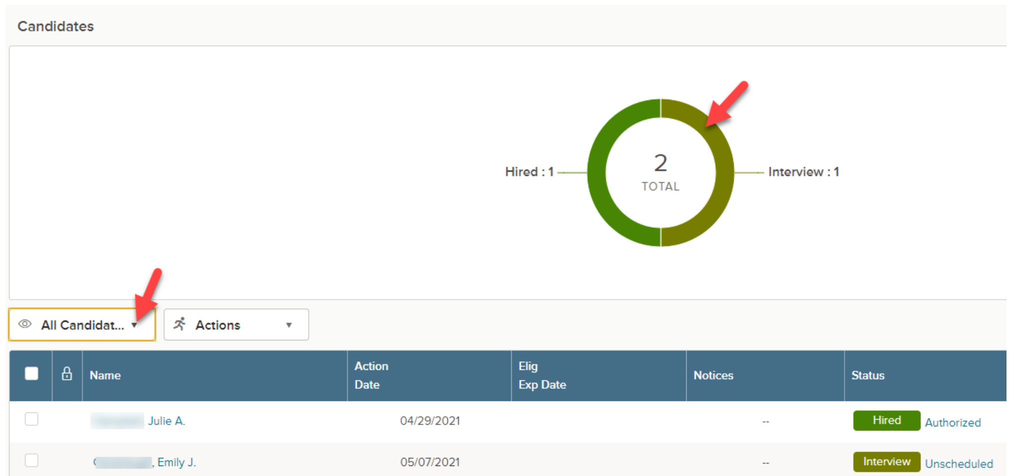
Steps to Send Notices

1. If you are not already viewing the referred list of candidates, return back. From the **My Requisitions** section, click the **candidate count**.

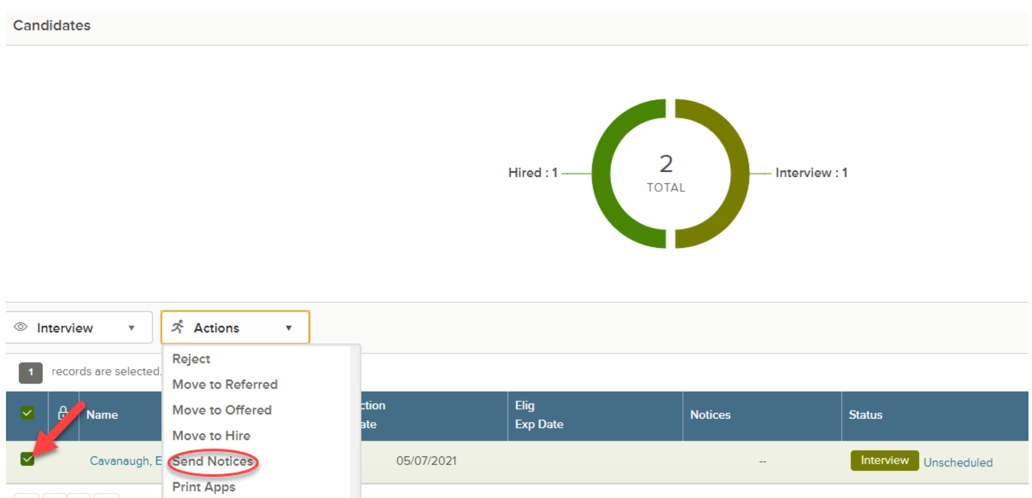


NEOGOV

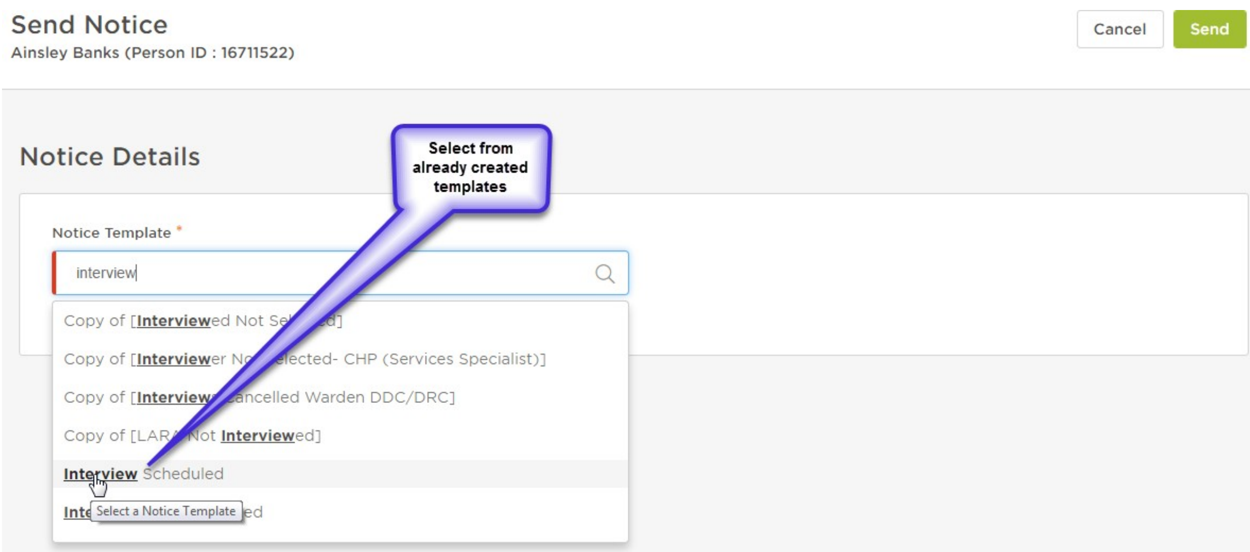
2. On the **Candidates** menu, click the doughnut chart or on the **All Candidates** drop-down to send notification.



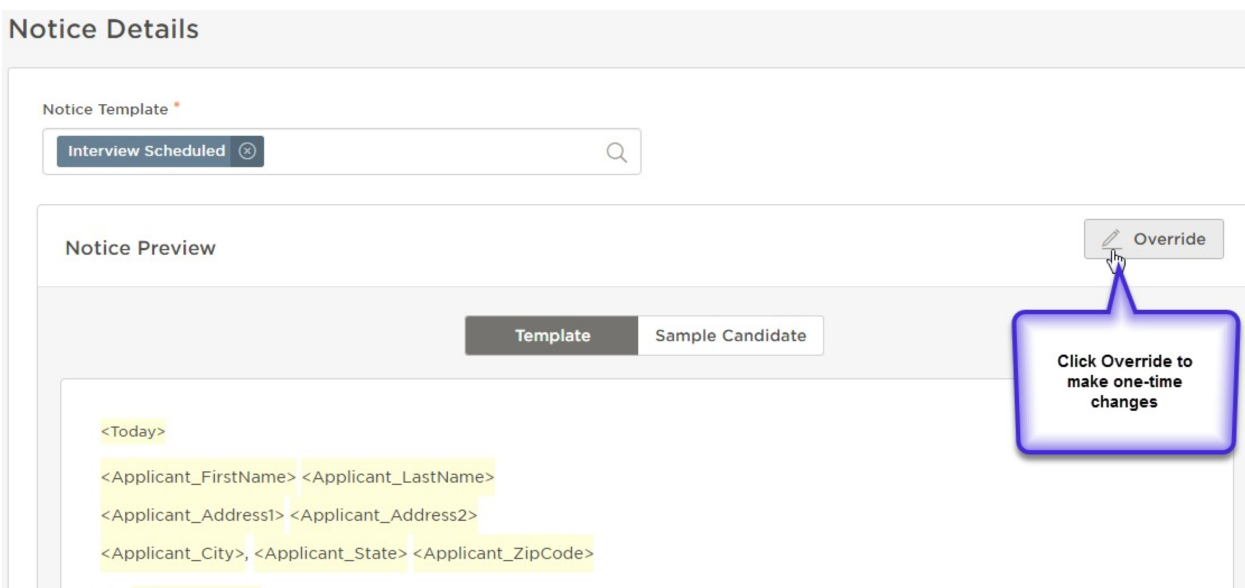
1. Select the candidates to receive notices by checking the box next to their name.
2. On the **Actions** menu, click **Send Notices**.



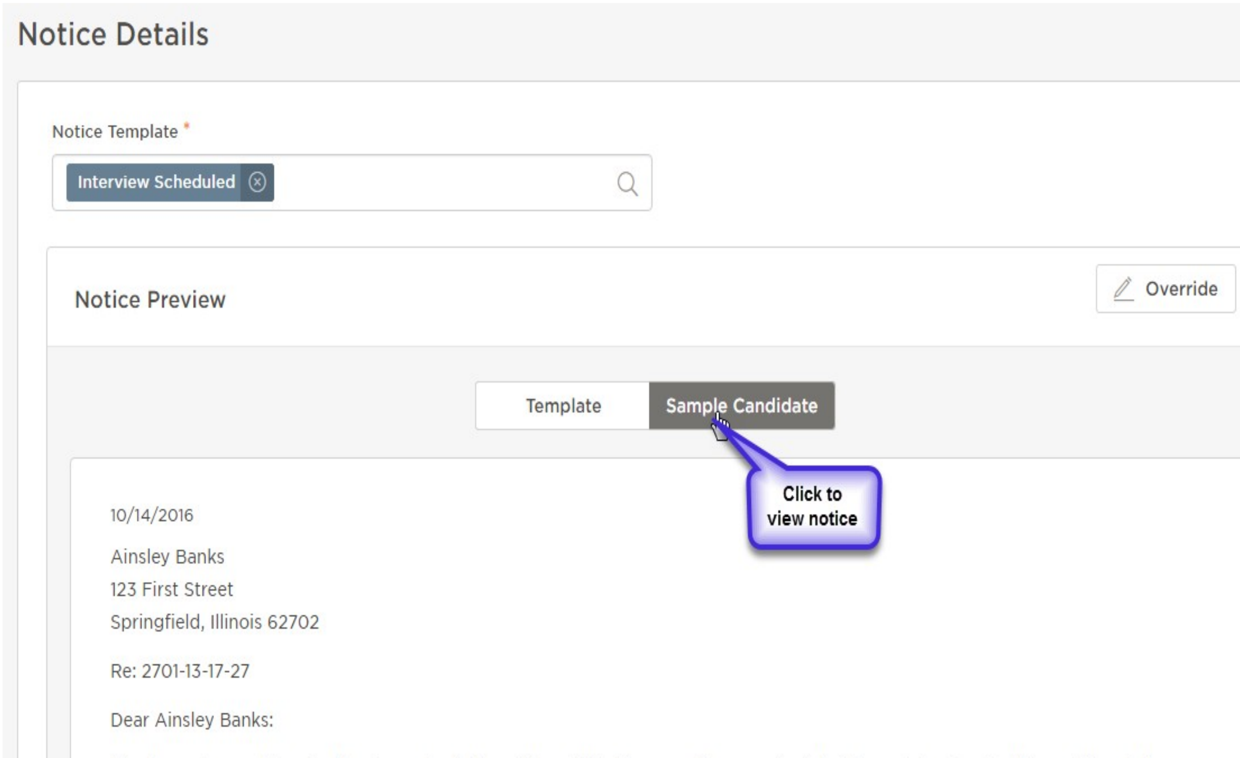
3. Select a notice template and click **Send**.



4. If necessary, click **Override** to make a one-time update to the notice prior to sending. This update will not affect the saved notice template.



5. Click **Sample Candidate** to view the notice with merged text.



6. Click **Send** to send the notice to all selected candidates.